

Human Resources Procedures

Personnel Recruitment

Employee Welcome & Orientation Employee Departure

October 2021

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## Personnel Recruitment & Hiring

The Estuary Partnership is an equal opportunity employer. Consistent with our EEO Policy, the Estuary Partnership extends equal employment opportunities without regard to considerations unrelated to qualifications or performance, including sex, race, religion, creed, color, age, national origin, ancestry, marital status, veteran status, physical or mental disability, sexual orientation, gender identity, genetic information, application for workers’ compensation benefits, use of statutory protected leave, or any other characteristic or status protected under applicable federal, state, or local laws.

The Estuary Partnership will offer reasonable accommodation, where needed, for applicants with disabilities.

It is important that no candidate be given preference or special consideration because of their relationship with the Estuary Partnership, staff, or Board members.

Once a position recruitment is advertised, the only Estuary Partnership employees who may recruit, provide information to, or meet with, a candidate are the Program Manager and the Executive Director. Estuary Partnership employees may not solicit, promote, communicate with, or assist any candidates unless the Executive Director requests them to do so. Candidates who reach out to staff should be referred to the program manager in charge of the specific recruitment or to the Executive Director; this includes candidates’ requests for information about the Estuary Partnership, a program, or any specific work. After a final candidate is selected, they may connect with current employees at the discretion of the program manager.

### Decision to Hire and Recruit

As provided in the Finance Policies, the Executive Director is authorized to recruit for positions that are in the two- year budget adopted by the Executive Committee. See Finance Policies for details.

If a Program Manager believes a position is warranted or a vacancy occurs, the Program Manager notifies the Executive Director and provides the justification for the position and its duties, as well as a projected, probable, and sustainable source of funding for the anticipated duration of the position.

Once the Executive Director authorizes a recruitment, the Executive Director and the Program Manager establish a recruitment timeframe process.

### Position Description

The Program Manager reviews the current position description and classification, recommending any changes to the Executive Director. Position descriptions may apply to several employees who have the same position; they are not individual to each employee or each recruitment. Because position descriptions are updated regularly by the Management Team, they should be ready to go for each recruitment. If the recruitment is for a new position, the Program Manager and Executive Director craft the position description once the Executive Director has authority from the Executive Committee to add a position and fill it**.**

### Announcement

The Program Manager or supervisor develops a short summary announcing the vacancy, develops supplemental application materials, if applicable, and obtains final authorization from the Executive Director for the application requirements and to post the position.

The announcement must list the job title, describe the specific job, and clearly state the application requirements and specific instructions for how to apply.

###

### Posting

The Administrative Assistant distributes the recruiting announcement using the current “Job Posting and Outreach” list, including to other Program Managers and the Board of Directors, who are encouraged to circulate the posting, as well. The Executive Director approves any postings that may be unique to a specific job posting. The Communications and Outreach team posts the announcement on the Estuary Partnership website along with the full position description and includes it in the Estuary Partnership newsletter and other electronic announcements.

### Diversity and Equity Statement.

*This language will be included in all recruitments:*

Our goal is to create and maintain an environment in which everyone feels respected and accepted. The Estuary Partnership embraces diverse points of view and backgrounds, treats all individuals fairly, justly, and impartially, and fosters an inclusive work culture.

The National Estuary Program is community-based; it is local people solving local problems in local water bodies. We achieve this best by creating equity and honoring diversity by continually adapting our programs to be inclusive of, and responsive to, the needs of community members. Diverse perspectives expand our understanding of each other and our community; our work caring for the lower Columbia River is enriched by our different cultural backgrounds, experiences, and needs. The Estuary Partnership is engaged in an ongoing process to identify and address inequities in our organization and our programs. We build equity across our entire organization: in our programs, workforce, policies, partnerships, and organizational culture. It is important that our organizational ‘table’ include all voices of the lower river. The more and better we work together, the better the river will be for us and future generations.

All employees and members of the Board of Directors join in this commitment.

### Application Materials & Process

At a minimum, application requirements for all positions must include:

* A cover letter- A cover letter should be one to five pages and express interest in the Estuary Partnership, be well organized, and clearly articulate how the applicant’s experience meets the specific requirements of the position and qualifies them for success.
* A resume- The resume should be concise and clearly define current and past duties and responsibilities, and the length of tenure in those positions.

Applications submitted incorrectly or late are considered incomplete and not accepted.

Additional requirementsfor applications may include responses to two or three essay questions.

Specific submission instructions are included with each job posting, and alternative forms of submission will also be indicated such as by mail or email.

#### Review for Completeness & Logging Applications Received

Applications are collected electronically and/or by the Administrative Assistant who will complete an initial review for completeness. After the posting closes, the Administrative Assistant will forward the list of candidates, with names redacted, to the program manager.

During recruitment, the files are stored in the HR/Recruitment/Active folder.

### Review Committee

The Program Manager selects a group of people to review applications and interview candidates. Review Committee members shall include at a minimum: the Program Manager and members to represent each program team. Additional team members or a different team composition may be considered based on the recruitment. The Program Manager will approve the review committee for all program staff recruitments; the Executive Director approves the proposed committee members for manager-level recruitments.

Members of the Review Committee evaluate and rank the candidates as follows:

* 1. Review applications to select applicants for a First Interview. The Program Manager may work with the Administrative Assistant to redact applicant identification, including names and addresses, if possible.
	2. Evaluate and rank based on the First Interview and select the top few for a Second Interview.
	3. Evaluate and rank based on Second Interview.
	4. The Program Manager, with the Review Committee’s input, recommends the top candidate to the Executive Director.

### Initial Review: Selecting Candidates to Interview

The initial review of candidates will be based on the required knowledge, skills and ability (KSA) as stated in the position description and a review of responses to any supplemental questions. The review may be completed in a matrix; an example is below. The results determine which candidates qualify for an interview. Scoring for the subjective portions of the matrix that grade a response to supplemental questions or other metrics that are not appropriately measured by a YES/NO response are graded on a scale of 1 to 5, with 1 being the lowest/only minimally responsive, while a 5 would indicate a full, well written response.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Candidate ID | Required KSA #1 (yes or no) | Required KSA #2 (yes or no) | Response to Supplemental #1 (subjective grade 1 to 5)  | Interview Decision(Interview or not, based on KSAs and responses to supplemental questions) |
| *Example Candidate #1* | *Yes* | *Yes* | *3* | *Yes* |
| *Example Candidate #2* | *Yes* | *No* | *4* | *No* |

### Interviewing:

The recruitment team should design interviews that evaluate a candidate’s ability to perform the essential and related duties of the position and to meet the organizational standards of performance. Based on the number of applicants to interview, a team may decide to conduct one or more interviews which may include an initial phone or virtual interview, in person interviews, and practical exercises.

Recruitment teams should be familiar with biases that may impact their interviewing and should work to design interview processes that minimize the impact of those biases, including steps such as:

* Ask candidates to keep their cameras off for first round interviews that are held virtually – interview panel participants should keep their cameras on.
* Consider conducting the first interview virtually.
* Always describe the job that needs to be done, not the person you are looking for.
* Create interview questions that are the same for all candidates in a recruitment.
* Use a rating matrix/rubric. The matrix should be designed in advance of any interviews being conducted and should reflect the questions being asked in the interview.

### Understanding Interviewing Biases

There are many issues that interviewers run into when they allow biases to get in the way. These can include:

##### STEREOTYPING

Forming an opinion about how people of a given gender, religion, race, appearance, or other characteristic think, act, respond, or would perform the job without any evidence that this is the case.

#### GENERALIZING

Occurs when interviewers assume an interviewee’s mannerism is part of their everyday behavior. For example, candidates who are nervous in an interview can be generalized as always nervous. An interviewer might generalize that a candidate lacks writing skills because the last two people hired from the same college had poor writing skills.

#### SIMILAR-TO-ME

Job interviewers tend to favor candidates who affirm their opinions and decisions and believe they communicate better with people who share their background, language, and belief system. Hiring people based on likeability can lead to a lack of creativity and a loss of critical evaluation in the workplace.

#### FIRST IMPRESSIONS

An interviewer might make a snap judgment about someone based on their first impression (positive or negative) that clouds the entire interview. For example, letting the fact that the candidate is wearing out-of-the-ordinary clothing or has a heavy regional accent take precedence over the applicant's knowledge, skills, or abilities.

#### HALO EFFECT

When an interviewer allows one strong point about a candidate overshadow everything else. For instance, knowing someone went to a particular university might be looked upon favorably, and everything the applicant says is seen in this light. ("Well, she left out an important part of the answer to that question, but she must know it, she went to XYZ University).

#### HORN EFFECT & NEGATIVE EMPHASIS

When an interviewer immediately judges a candidate negatively based on a single characteristic. Research indicates that interviewers give unfavorable information about twice the weight of favorable information.

#### CULTURAL NOISE

Since candidates want the job, they will provide answers the interviewer wants to hear, even if they are not entirely truthful. For example, an applicant might say that they have no problem working in a team setting, when this is not the case. Interviewers should prepare questions that probe for examples, instead of ones that elicit "yes" or "no" answers.

#### NONVERBAL BIAS

Undue emphasis might be placed on nonverbal cues that have nothing to do with the job, such as loudness or softness of voice, or the type of handshake given.

#### CONTRAST EFFECT

This occurs when an interviewer compares candidates to each other or compares all candidates to a single candidate. For example, if one candidate seems weak in some skill, others may appear to be more qualified than they really are.

*Adapted from Society for Human Resource Management*

### Interview Questions

The goal of the interview is to collect accurate information in a uniform manner from all respondents. Here are some tips:

* Base interview questions on position criteria.
* Ask the same questions of each candidate and score them with an identified rating system.
* Conduct the interview in a private location that is accessible.
* Take notes to minimize interviewer bias or subjectivity.

There are various types of interviewing techniques that can be used when evaluating applicants. A combination of techniques will give the interviewer the best assessment of an applicant’s potential. Here are some examples:

#### DIRECTIVE

These questions require an applicant to respond with a precise answer. They usually relate to work history and the applicant’s ability to perform the duties of the position. Examples include:

* Tell me/us how your background has prepared you for this position.
* Tell me about your experience with diverse groups of people and/or communities.
* What is your experience with social/environmental justice?
* What do you think the main challenges will be for you in this position?
* What are the skills or qualities which you will bring to this position?

#### NON-DIRECTIVE

These interview questions are open-ended and give the applicant an opportunity to decide what direction they will take in answering them. Examples include:

* How would you describe yourself?
* How would your friends describe you?
* What is your philosophy on diversity, equity, and inclusion?
* What did you like best about your last position?

#### BEHAVIORAL

These questions offer the opportunity to assess how an applicant might perform in the position by asking for examples of past performance that may help determine future performance. These questions are more about personality and how an applicant confronted interpersonal interactions in a work setting. Examples include:

* Tell us about a time when you displayed good leadership skills.
* When did you handle conflict on the job? Tell me about it and how you dealt with it.
* Tell us about a project that you completed start to finish.
* Explain how diversity has played a role in your education and/or career.

#### SITUATIONAL

These questions are like behavioral questions; however, they compel an applicant to speak about how they would deal with a particular issue in the future. These questions use a problem-solving approach to determine the applicant’s analytical skills and critical thinking abilities. Examples include:

* How would you respond to [insert a particular situation or problem?
* Describe how you would connect people or groups from diverse communities to our organization? What do you expect the challenges would be? What do you expect the benefits would be?
* You disagree with the way your supervisor says to handle a problem. What would you do?
* What would you do if the priorities on a project you were working on changed suddenly?

### Interviewing Applicants

#### PRE-INTERVIEW

* Appoint one person to communicate with applicants throughout the recruitment process.
* It is important to determine the applicable skills for success.
* Create an interview structure that will talk about the uniqueness of the position. Make sure to address skills that are required and/or will be gained in the position as well as some of the barriers that might exist (i.e., physical, and other requirements, transportation, housing, and community).
* Assemble a diverse interview team that will give you varying perspectives. If there are currently staff members holding the positions being filled, including them in the panel is good consideration.
* Send interview questions to candidates 24-hours in advance.

#### INTERVIEW

* Conduct interviews in person or by video conference. If that is not possible, realize that phone interviews can be challenging for both the interviewer and the interviewee. Try to spend enough time speaking with the applicant so that both parties feel informed about skills and expectations.
* All requirements for your position must be made clear during the interview. (Requirements may include physical minimums, a car, driver’s license, driving policy, weekend or evening hours, specific dress codes, drug testing or a background check, etc.)
* Housing and Transportation can be a deciding factor for many out-of-town applicants. Make sure to share information about commuting options:
	+ Housing – Is it provided? What does it look like? If not provided, where should they look for housing?
	+ Public Transportation - Is a bus pass offered? What are the options? How close does it drop off? How often does it come?
	+ Personal Vehicle - Is a personal vehicle really needed? Are there alternatives?

#### POST-INTERVIEW

Following the interviews, the top scoring candidate should be identified by the team. The Program Manager should brief the Executive Director and complete the reference checks for the identified candidate. The reference check should not be used to identify a candidate but to confirm the selection.

Two reference checks on should be conducted for the selected candidate(s).

### SUGGESTED REFERENCE CHECK QUESTIONS

Suggested Introductory Script:

*The Lower Columbia Estuary Partnership is a National Estuary Program and nonprofit organization working to restore and care for the waters and ecosystems of the Lower Columbia River, for current and future generations of fish, wildlife, and people. Our primary goals are to foster stewardship, provide objective scientific information, and facilitate consensus regarding regional goals to protect the lower Columbia River and estuary. Our approach is to restore habitat while advancing science, to improve river conditions as we learn more, and to expand the knowledge and experiences of the next generation of decision makers. The position that we are considering (name of candidate) for is (position being considered for).*

* + In what capacity have you known the applicant and for how long?
	+ Do you feel they can perform the position responsibilities, and can you describe their applicable skills?
	+ Where would you anticipate them needing the most support?
	+ Do you consider them to be a self-starter who can work well on unstructured projects or are they better suited to a position that has more structure with outlined duties?
	+ Do you feel that they will be comfortable taking on entry-level/mid-level/supervisory/managerial work? This could be anything from \_\_\_\_\_\_\_ to \_\_\_\_\_\_\_\_ (describe some of the potential duties and tasks).
	+ How do they deal with constructive feedback?
	+ Are they someone you would want to work with again?
	+ What are the top three adjectives you would use to describe them?
	+ Is there anything else I should take into consideration before making my decision?

### Offer of Employment

The Executive Director authorizes hiring negotiations with the selected candidate and a salary to offer. The Program Manager will generally make the offer and completes negotiations in consultation with the Executive Director.

#### Making and Negotiating the Job Offer

* Restate salary range and negotiate as necessary, within authorized range.
* Provide an overview of benefits (obtained from the Finance and Operations Manager).
* Ask what their start date would be. Negotiate as necessary.
* Discuss any already-scheduled vacations and how they will be handled—accrued leave, leave without pay, etc.
* Let the candidate know that the Estuary Partnership will conduct a background check and that any job offer is contingent upon the Estuary Partnership’s receipt of satisfactory results from the background investigation.
* Typically, an email message is sent to the candidate and the candidate confirms.

### Letter of Hire

Once the Executive Director approves an offer of employment, the Finance and Operations Manager will draft a formal letter of hire for the new employee.

Each new employee, including interns and limited term employees, must receive a Letter of Hire stating the title of the position, classification, compensation, beginning date of employment, number of hours to be worked per week, work schedule, Supervisor, any special considerations and agreements such as pre-planned leave, summary of benefits (that would have been reviewed during employment negotiations), orientation procedures the employee is required to complete, and expected length of the position, if it is a limited project position. Every Letter of Hire must state that employment with the Estuary Partnership is at-will, and that the employee will be expected to comply with all policies in the Employee Handbook. The letter must also include any pre-scheduled leave dates requested by the employee; the letter shall indicate that the leave is approved and may be taken without pay if accrued leave is not available.

The Finance and Operations Manager sends the letter of hire electronically to the new employee with an electronic copy of the Employee Handbook, and requests the new employee confirm the terms of the letter in a response email. The letter and response are retained in the employee’s personnel file.

#### Recruitment File -Active

For each open recruitment, an electronic recruitment file shall be maintained that contains:

* All applications, including all resumes and cover letters and any other materials requested.
* Completed evaluation matrix by each member of the review team for Ranking 1 (applications).
* Composite score matrix for Rankings 2 and 3 (First and Second interviews).

#### Recruitment File -Archive

When the recruitment has closed, the electronic archived recruitment folder shall include only the following:

* Posting and recruitment information and announcements.
* Application process and requirements.
* Interview questions.
* Reference questions.
* Position description.
* Interview evaluation materials used by the recruitment team; these files should be maintained for one year following the closing of the recruitment.

Following the close of recruitment, all application materials for all applicants will be saved in an archived recruitment folder, by position title and date. These applications should be maintained for one year from the date of application. In the event of a claim of discrimination, all records related to that claim must be maintained until the claim is complete.

## Welcome & Orientation

In consultation with the new employee’s Supervisor, the Administrative Assistant develops a plan for the new employee’s first day to welcome them to their team and the organization. The Supervisor and the Administrative Assistant greet the new employee upon their first day.

Besides completing necessary paperwork and settling into their workspace, the first day plan also engages the new employee through: introductions to all staff members who are present; a tour of the office and the building; often lunch or coffee out with members of their team; and any other opening day activities arranged by the supervisor (such as a classroom or work site visit).

### Orientation

All employees should welcome new employees.

#### Supervisor

1. Introduce the new employee to everyone in the office at the time and seek out times to introduce the new employee to other staff over the course of the employee’s first week.

1. After the new employee has met with the Administrative Assistant and Accounting and Operations Assistant, debrief with the employee and give them a chance to ask questions or even hear it again. A lot of new information can be overwhelming.
2. Complete the employee’s regular schedule form.
3. Discuss the job expectations with the new employee and explain the Introductory Period and its purpose. Review the annual performance review process.
4. Provide the employee with a copy of the 1999 Comprehensive Conservation Management Plan, Volumes 1 and 2, and the 2011 Update Management Plan actions.
5. Introduce new employees to DEI initiative of the Estuary Partnership.
6. Identify a primary Team Partner for the new employee from the same program team. (Community Programs, Technical Programs, and Executive Team which includes the Communications and Outreach team.)
7. Host an informal meeting with the new employee’s program team to introduce the team. Encourage the new employee to share their experiences and expertise and have other team members introduce themselves and share the team’s work.
8. Make sure the new employee has access to the people and resources (procedures, templates, SharePoint system) needed to do their job and knows how to complete their timesheet. For field staff, ensure the employee knows the process for vehicle reservation and field procedures.
9. Check in with the new employee regularly during the introductory period.

#### Team Partners

1. The team partner will assist the new employee in getting to know the team members, learning about the program team, how it works, ins and outs of day-to-day work (e.g., reserving cars, using the program folders in SharePoint) the scope of their team’s and the Organization’s work, etc.
2. The team partner can also help the new employee get to know others in the organization.
3. Team Partner:
	1. Meets regularly with the employee, shares perspectives, answers questions, and generally helps the employee feel part of the Estuary Partnership and program team as well as helping them understand the work and learn about the organization.
	2. Encourages the new employee to share their experiences, expertise, and perspectives.

#### DEI Steering Team Coordinator – DEI Buddy

The DEI Steering Team will assign a DEI Buddy to each new employee.

1. Provides the employee with a history of the Estuary Partnership DEI work, including the DEI strategy and the DEI resources on SharePoint, answers any questions the employee has, and encourages employee to share their experiences with DEI.

#### Communications and Outreach Team

1. Meet with the new employee.
2. Develop an employee photo and bio with the employee in the Estuary Partnership format.
3. Update website and other materials to include the employee.
4. With the permission of the employee, post bio or announcement about the employee on social media.
5. Provide an overview of Estuary Partnership communication tools, fundraising, and community building activities.

#### Executive Director

1. Meet with the new employee, share Estuary Partnership history, goals, structure and team approach, and commitment to DEI.
2. Encourage the employee to share past experiences, ask questions, etc.
3. Check with new employee to make sure they have access to people, files and procedures necessary to do their job.

#### Accounting and Operations Assistant

1. Complete New Hire Paperwork: I9, Federal W-4, Oregon W-4, Direct Deposit (explain Intuit invitation)
2. Review timesheet process and how to navigate
3. Set up Benefits Chronology in Outlook

#### Finance and Accounting Manager or Assistant

1. Review benefits chronology and give orientation to benefits
2. Send invitation to Intuit

#### Administrative Assistant

1. Prior to the employee’s start date, the Administrative Assistant should contact Bass IT with start date, new employee’s name, distribution group (Science/Community Programs, etc.), set Calendar Permissions to “Full Details.” Bass will: Set up technology (computer, monitor, keyboard, telephone, email, network login, password, folder access, Outlook folders and calendars access, etc.) and create a welcome sheet. The Administrative Assistant should also create an LCEP contact card for the new hire.
2. Make sure the new employee has been introduced.
3. Review Employee Handbook, Policies, Office Procedures, sign agreement.
4. Connect the employee with their DEI Buddy, which should have been assigned by the DEI Squad.
5. Coordinate with Communications and Outreach Manager to have get bio and photo included on website.
6. Review Office Operations
	1. Photocopier/Fax Machine/Postage Machine; the Administrative Assistant should add the employee’s email to the copier.
	2. Office Supplies
	3. Fitness and Rest Room Access and Codes; the Administrative Assistant should also send the new employee the fitness waiver to be signed
	4. Organizational Chart
	5. Communications Protocols/Guidelines (Print, Media, Website)
	6. Formatting – Logo, Fonts, etc.
	7. Computer Network System/Outlook
		* Sharing Calendar/Meeting Requests
		* Access to Public Folders
		* Database
		* SharePoint
		* Timesheets
		* Reserving vehicles and rooms
		* Administration\Personnel\Employee Forms
			+ Request for Leave
			+ Expense Report
			+ Travel Authorization
		* Administration\Personnel
			+ Staff Contact List
	8. Telephone (set up voice mail)
	9. Offsite Email and Voice Mail Retrieval

### Performance Review

The Estuary Partnership values regular and consistent feedback for all employees and encourages regular interaction between supervisors and subordinates to ensure that performance concerns are addressed early.

The annual performance review process should be a time for employees to receive feedback from their supervisor and team, and to provide feedback to their Manager and the Executive Director related to their position, working with their team and across teams, ideas for future projects, and other information that may be important to the employee or to the organization.

One of the components of the Annual Review process is a 360 Feedback Survey that allows staff to receive feedback directly from the people they work with. All 360 Feedback is managed by the Executive Director, or their designee, and administered using anonymous surveys and presented to employees via a dashboard. As of 2022, participation in the 360 process is voluntary for non-management team employees.

The review process is conducted at the end of the year, with all performance reviews completed by 30 December of each year. There are several key dates within the review process:

* November 15 – The 360 surveys are sent to all staff who will be providing feedback. The annual PE forms are sent to all staff members. Managers will set meeting times with their direct reports to complete the PE interviews.
* December 1 – PE “season” begins. The 360 surveys are due. Initial meetings with managers are completed during early December. Employees receive their 360 feedback during their meeting with their manager. Meetings with the Executive Director will be completed in December.
* December 30 – PE “season” ends.

*360 Feedback Survey – Basic Form:*

The 360 Feedback Survey is sent via a Survey Monkey to all participating staff members. Staff, non-manager level employees may identify up to four questions that they would like to ask of up to 3 other staff members from their team. Thematic question prompts to assist team members are below:

* Communication – written, verbal, getting ideas across, communicating informally with team members, or using communication tools like non-violent communication.
* Work product – project management, project development, completion of work products
* Work with partners – outreach, communication, collaboration, etc.
* Teamwork – working with team members, accountability to team, collaboration, support of other team members, etc.

The 360 format for Management Team employees is a list of standard questions with Likert scale responses, and two open ended questions.

Below is an outline of the standard questions for Management team members.

Manager 360 – Basic Questions:

Please answer the following questions on scale of 1 to 10, where 1=highly disagree, 5= neither agree nor disagree, and 10=highly agree.

1. When making important decisions, this manager considers the feedback of others.
2. This person is available to provide help and feedback when you want or need it.
3. This person sets clear direction that aligns with the organization's strategy.
4. You receive constructive and helpful feedback from this person, and you receive that feedback on a regular basis.
5. This person able to resolve conflict appropriately.
6. The actions of this person inspire growth and development in others.

Answer the following questions in the text boxes provided, giving examples where possible.

7. What are 1 to 2 areas that this manager excels at?

8. What are the 1 to 2 areas that this manager may benefit from improving?

*Annual Performance Evaluation Coaching Form:*

The Annual PE Coaching form can be found at: [Annual PE Coaching Form](https://estuarypartnership.sharepoint.com/%3Aw%3A/g/EXhaWvtMhgReuUszbCjlrREB1D34fo3VA-kdPvt3YqTKdw?e=hOTaGp)

Below are the questions in the current form.

*Manager – Employee Coaching:*

Questions:

1. What work activities excite you?
2. Do you have the tools you need to be successful?
3. What would you like more exposure to?
4. Is your job description reflective of the work you do? If not, please describe.
5. Do you feel like your skills and abilities are being put to their best use? Are there other projects, jobs, or duties you would like to take on?
6. Where do you see yourself in the next 2 years?

*Director – Employee Coaching:*

Questions:

1. How would you rate your overall job satisfaction on a scale of 1 to 10, with 10 being the highest and 1 the lowest? How would you grade yourself in terms of doing your best work every day, finding a balance in terms of the Partnership’s needs and your own career and personal development interests, and feeling like you're firing on all pistons in terms of your overall performance? (Follow Up- what would move you from an X to a 10?)
2. Which of the following five categories holds the most significance for you career-wise at this point?

(a) opportunities for promotion and advancement

(b) rotational assignments to gain a broader understanding of the organization's operations and key players

(c) additional training, certification, and acquisition of new technical skills

(d) money and other forms of compensation

(e) work/life balance

How can the organization support you in that?

1. What are the greatest strengths of our organization?
2. What are the areas that need the most improvement in our organization?

## Employee Files / Personnel Records

The Finance and Operations Manager shall maintain personnel files for all employees, which may include a paper file and an electronic file. Personnel files are confidential and may only be accessed by the Executive Director, the Administrative Assistant, the Finance and Operations Manager, the Accounting and Operations Assistant, and the employee’s supervisor, as needed.[[1]](#footnote-2) Additionally, employees may request a copy of their personnel records. The Estuary Partnership must provide employees with the opportunity to inspect their personnel records, or a copy of the records, within 45 days of an employee’s request. Anyone else who wishes to view an employee’s personnel records must receive authorization from the Executive Director.

#### Personnel File Contents

* Position description(s)
* Resume(s)
* Application materials
* Letter of hire
* New Hire Paperwork
* W-4
* Direct Deposit form with voided check
* Background Check- Executive Director confirmation of acceptable background check results. (Results themselves should NOT be placed in personnel file.)
* Employee Handbook Acknowledgement
* Pay Period Work Schedule
* Emergency Contact Information
* All coaching/performance evaluations signed by the Employee, Supervisor and Executive Director
* Annual Workplans
* Performance related correspondence to and from Employee
* Memos or notes to the file about Employee’s performance
* Letter of resignation or termination

#### Benefits File Contents

The Estuary Partnership shall maintain a separate Benefits File for each employee. This file shall contain all completed forms and approvals necessary for administering the employee’s participation in benefits programs available through the Estuary Partnership. The Benefits File shall include the following items, as applicable:

* Health insurance enrollment form (including signed waiver of coverage, if appropriate)
* Dental insurance enrollment form
* Disability insurance enrollment form
* Life insurance enrollment form
* Flexible Spending Account (or similar) enrollment form
* Insurer verification of successful enrollment in all of the above, as appropriate
* Retirement plan Salary Reduction Agreement
* Affidavit(s) of Domestic Partnership, as required by insurers
* Supplemental items that provide support, if necessary, for any of the above
* Any other necessary information and forms required for participation in any of the Estuary Partnership’s benefits programs.

The Finance and Operations Manager shall ensure that the Benefits File contains all necessary forms and approvals for the benefits programs. The Accounting and Operations Assistant shall create and maintain a paper copy folder for each employee eligible for benefits.

#### Medical Information

Health and medical information, including confidential information related to disabilities or medical conditions and/or protected leaves of absence, is kept in a separate file and accessible only by those employees with a need to know the information. Files containing health and medical information are maintained by the Finance and Operations Manager. Anyone else seeking to access the information must obtain written authorization from the Executive Director.

## Employee Departure

### Termination of Employment

Termination of employment may be voluntary (initiated by the employee) or involuntary, and with or without notice. Where the separation is unplanned or the Estuary Partnership does not have advance notice, some of the procedures below may need to be completed after the separation.

### Requirements Prior to Final Day of Employment

When the Estuary Partnership knows in advance of a separation and it is practicable to do so, the following should be completed or planned within ten days prior to the last day of employment:

#### The Administrative Assistant

* Notify the IT consultant with date and time for IT changes, which shall include:
* Change employee network password to prevent offsite access to e-mail
* Remove the employee account from Estuary Partnership staff distribution list.
* Hide / Remove the employee account in the Global Address List.
* Enable Out-of-Office notifications with the message: Sample: ‘Firstname Lastname is no longer with the Estuary Partnership. For assistance, please contact [supervisor’s name, email and phone].’
* Record employee departure date in “description” field in Active Directory (General Tab).
* Enable permissions for employee’s supervisor to access employee’s mailbox (Add mailbox to Outlook profile of the employee’s supervisor for monitoring).
* Move user account into archived (purgatory) folder.
* Check with IT Consultant after 30 days to confirm final IT actions:
	+ Export mailbox to .PST and burn to CD.
	+ Delete domain account (and mailbox).
* Retain the letter of resignation or termination in the electronic and paper Personnel File including any correspondence between the employee and the supervisor regarding the letter.
* Confirm that keys, access cards, or Estuary Partnership credit cards, as applicable, have been returned.
* Delete the Employee from outside accounts, as applicable, e.g., FedEx or Rental Car accounts
* Clear voicemail greeting message on telephone extension.
* Remove the employee from the Estuary Partnership voice directory extension list.
* Ask Communications and Outreach Manager to change staff listing on Estuary Partnership website.
* Remove from staff contact list.
* Delete employee from scanner on copier.

#### The Employee

* Turn in remaining Estuary Partnership equipment, clothing, and other property.
* Forward phone extension and any voice mail messages to Supervisor.
* Complete and sign a final timesheet for hours worked/paid.

#### The Finance and Operations Manager or Assistant

* Secure forwarding contact information and verify the mailing address where the employee would like to receive post-employment communications such as benefits and tax information.
* Secure from the employee a signed final timesheet for hours worked/paid. Or, in the case of an involuntary discharge where this is not practicable, prepare a check for all hours the employee will work until the time of termination.
* Prepare for a final check in accordance with Oregon law. In most cases, an employee should receive all wages due on the employee’s last day of employment.
* Calculate the vacation accrual payout amount, if any, and regular pay. Employees who resign without providing a minimum of two weeks’ notice do not receive vacation payout.
* Include the full benefit allowance and full insurance deductions for that pay period.
* Determine whether the final pay will be through the scheduled Intuit direct deposit payroll process, or via manual check.

o If manual check, calculate check and have signed by the Executive Director and report to Intuit.

* Provide outgoing employee with a COBRA Election Notice or notice of State Continuation coverage, as appropriate, for medical and dental coverage.
* Provide outgoing employee with a voluntary life insurance portability form, as needed.
* Notify relevant providers and benefits vendors of termination date and, if known, of COBRA/continuation/portability enrollment
* Disability and Life
* Medical & Dental
* Flexible Spending
* Retirement
1. Access to the Executive Director’s personnel file is limited to the Officers of the Board of Directors. [↑](#footnote-ref-2)