

EMPLOYEE STANDARDS AND PERFORMANCE POLICY

Approving Authority: President & Chief Executive Officer

Administrative Responsibility: Director, Policy Research & Advocacy

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Related Policies, Procedures, and Documents:

- Executive Limitation #2b – Treatment of Staff
- Ends Policy #1
- Conflict of Interest Policy
- Health and Safety Policy
- Prevention of Workplace Harassment, Discrimination, and Sexual Misconduct
- Prevention of Workplace Violence
- Safe Disclosure Policy

1. Purpose

- 1.1. This policy outlines the principles and guidelines used by the Wilfrid Laurier University Students' Union (Students' Union) to inform employee standards and address performance or conduct issues.

2. Approach

- 2.1. The Students' Union is a community-focused organization that strives to promote a culture of inclusivity and actively works to create a fair, equitable, and fulfilling workplace. When behavior or performance issues arise the Students' Union, when possible, incorporates principles of restorative justice to respond to and find meaningful solutions to instances of harm with a dignified emphasis on dialogue, negotiation, and accountability.

3. Definitions

- 3.1. **Employee:** A paid worker of the Students' Union.
- 3.2. **Impaired:** The state of being affected by alcohol or drugs to the extent of losing control over one's faculties or behavior.
- 3.3. **Intoxicating substance:** Any substance that if consumed, has the effect of intoxicating the user and impairing their ability to perform their job duties. This includes, but is not limited to

alcohol, opiates, hallucinogens, cannabinoids, or medication (either prescription or over the counter, including medical cannabis).

- 3.4. **Performance Management:** A collaboration between supervisors and employees to identify goals, expectations, and discuss priorities and concerns.
- 3.5. **Supervisor:** The individual to whom an employee directly reports, or their designate.
- 3.6. **Workplace:** Any site at which the employee works, including any property or building utilized by the Students' Union and any other place an employee is located while performing work for the Students' Union or representing the organization.
 - 3.6.1. Workplace includes operating Students' Union equipment or a personal vehicle while the employee is on duty.

4. Jurisdiction/Scope

- 4.1. This policy applies to all Students' Union employees.

5. General Expectations

- 5.1. Employees are expected to follow all applicable laws of the jurisdiction in which they are working.
- 5.2. Employees are expected to follow all policies, guidelines, and instructions relevant to their role, including but not limited to the:
 - 5.2.1. **Accommodation Policy**
 - 5.2.2. **Conflict of Interest Policy**
 - 5.2.3. **Customer Service Policy**
 - 5.2.4. **Employee Hiring Policy**
 - 5.2.5. **Employee Vacation and Leave Policy**
 - 5.2.6. **Health and Safety Policy**
 - 5.2.7. **Safe Disclosure Policy**
 - 5.2.8. **Prevention of Workplace Harassment, Discrimination, and Sexual Misconduct Policy**
 - 5.2.9. **Prevention of Workplace Violence Policy**
- 5.3. Employee activity shall be guided by the Students' Union Ends Policy, which outlines that Wilfrid Laurier University students should benefit from an affordable, accessible, and high-quality academic experience; a safe, sustainable, and empowering environment; diverse and inclusive social interaction; and products and services that cater to the financial needs of students.
- 5.4. Employees acknowledge that the Students' Union operates on the campuses of Wilfrid Laurier University, and as a result their actions are at times subject to university policies.
- 5.5. Employee probationary periods are outlined in the employment contract.
- 5.6. The Students' Union's core administrative hours of operation are 8:30am to 4:30pm, Monday through Friday.
 - 5.6.1. Students' Union businesses operate on varied schedules that are subject to change.
 - 5.6.2. Supervisors will coordinate attendance expectations with their employees based on specific

role needs and requirements.

5.6.3. Employee break and meal period entitlements are outlined in the employment contract.

5.6.4. If the University is closed due to inclement weather employees are, in consultation with their supervisor, expected to work from home if feasible, unless otherwise instructed by the President or Executive Director.

5.6.4.1. The Hospitality Services General Manager or their designate will direct the operation of essential services, including communication with essential staff.

5.7. If an employee elects to resign from their position, they are required to submit a letter of resignation to their supervisor and Human Resources no less than two (2) weeks in advance of their departure date.

6. Privacy and Confidentiality

6.1. The Students' Union protects and respects the confidentiality of all information entrusted to the organization, and all employees are expected to handle sensitive and privileged information in a confidential and appropriate manner.

6.2. Employees will take reasonable precautions to protect confidential information and data while it is in use and through the manner it is stored.

6.2.1. Confidential material shall only be accessed on Students' Union devices or through secure Microsoft Outlook or SharePoint accounts.

6.2.2. Confidential material is not permitted to be shared with unauthorized parties.

6.3. Employees may from time-to-time be in possession of the personal information of undergraduate students through the provisions of the Students' Union's Operating Procedures Agreement with Wilfrid Laurier University.

6.3.1. Employees are required to collect, use, retain, and destroy all confidential and personal information received from Laurier in accordance with University policies and procedures and Ontario's *Freedom of Information and Protection of Privacy Act*.

7. Orientation and Training

7.1. Employees will be onboarded into new roles as directed by their supervisor.

7.2. New employees are required to complete all applicable legislated training, including but not limited to:

7.2.1. New Employee Health & Safety Orientation for Workers

7.2.2. Young Worker Health & Safety Orientation

7.2.3. Workplace Hazardous Materials Information System

7.2.4. Accessibility for Ontarians with Disabilities Act

7.2.5. Integrated Accessibility for Ontarians with Disabilities Act

8. Probationary Period

8.1. The terms and conditions of an employee's probationary period will be outlined in the employment contract.

9. Fit for Work Guideline

- 9.1. All employees are expected to report for work able to perform their assigned duties safely and acceptably without any limitations due use of intoxicating substances that may impair judgement or performance.
- 9.2. If an employee requires accommodation for a medical condition that affects their fitness for work, including substance abuse or addiction, the accommodation must be coordinated according to the Students' Union's Employment Accommodation Policy.
- 9.3. If an employee exhibits signs of impairment their supervisor will determine the appropriate course of action in consideration of all reasonably determinable circumstances in consultation with a Human Resources representative.
 - 9.3.1. If the use of alcohol or illicit drugs is acknowledged or readily apparent, the employee will not be permitted to work and the supervisor, in consultation with a Human Resource representative, will ensure safe transportation home and follow-up wellness checks if required.
 - 9.3.2. The employee must demonstrate, to the satisfaction of their supervisor and Human Resources, that they are fit to return to work at a later date.
- 9.4. If an employee is determined to not be fit for work, the Supervisor will complete an incident report, and in consultation with a Human Resources representative, initiate the conduct process as applicable.
- 9.5. When addressing persistent fit for work incidents, the Students' Union will encourage early treatment, support, and the safety of the employee and workplace.

10. Dress Code

- 10.1. The Students' Union requires a "Smart Casual" standard for employees working in campus office locations, while business employees must adhere to the requirements of each operation.
 - 10.1.1. While "Smart Casual" is the standard, employees should dress for their daily role requirements, which on occasion could range from casual to formal attire.
- 10.2. "Smart Casual" requires the following:
 - 10.2.1. Closed toed shoes.
 - 10.2.2. Pants that are clean and free of rips, tears, or offensive odors.
 - 10.2.3. Blouses, button-up shirts, collared shirts that meet the top of the pant hem when standing naturally and are free of controversial or offensive graphics or slogans.
 - 10.2.4. Shorts, skirts, or dresses must be no higher than six (6) inches above the knee.
- 10.3. T-shirts are not permitted unless covered by a blouse, collared shirt, or blazer.
- 10.4. Quarter-zips are permitted so long as a blouse, button-up shirt, collared shirt, or collarless shirt is worn underneath.
- 10.5. Wilfrid Laurier University and Students' Union branded hoodies and casual sweaters are only permitted on Fridays, so long as an employee does not have a commitment requiring more formal attire.
- 10.6. Overalls, athletic apparel, pajamas, and bedroom attire are not permitted.
- 10.7. Employees should avoid attire that is overly form fitting or revealing.
- 10.8. Supervisors are tasked with ensuring employees understand standards and expectations of the Dress Code.

- 10.9. Accommodations and exemptions may be authorized by an employee's supervisor in consultation with a Human Resources representative when necessary.

11. Representing the Students' Union

- 11.1. The President and Chief Executive Officer, as the primary public representative of the Students' Union, will oversee the delegation of all external organizational representation duties in consultation with the Executive Director.
 - 11.1.1. Employees must not intentionally or inadvertently create the perception that they speak on behalf of the Students' Union when not approved to do so.
- 11.2. The creation of new Students' Union social media accounts is limited to the Marketing and Communications Department.
- 11.3. Employees must consider the impact and unintended consequences of their personal social media usage and refrain from posts that suggest Students' Union endorsement of their actions, opinions, or political affiliations.
 - 11.3.1. Employees are not permitted to share confidential or proprietary information on their personal social media accounts.
 - 11.3.2. Employees must refrain from wearing Students' Union attire or branded merchandise when posting material on personal social media accounts that is not consistent with the emphasis of these employee standards.

12. Grievances

- 12.1. If an employee believes the Students' Union, or an employee or volunteer, has acted in contravention of their employment contract or organizational policies, they may file a written grievance.
 - 12.1.1. Employees are encouraged, where possible, to discuss complaints related to their role, their contract, employees, volunteers, or organizational policies with their supervisor.
 - 12.1.2. Incidents related to workplace violence or harassment will be addressed according to the **Prevention of Workplace Harassment, Discrimination, and Sexual Misconduct Policy** and the **Prevention of Workplace Violence Policy**.
 - 12.1.3. If a complaint involves an employee's supervisor, they may at any point in the process disclose directly to Human Resources.
- 12.2. **Grievance Process:**
 - 12.2.1. Employee discloses complaint to their supervisor.
 - 12.2.2. If, after reasonable time for action and additional discussion, the employee is not satisfied that their complaint has been adequately addressed they may submit a Grievance Report form to Human Resources.
 - 12.2.3. After a Grievance Report is filed, the Supervisor will take reasonable steps to further understand that context of the complaint and then schedule a meeting with the employee to discuss possible resolutions, in consultation with Human Resources.
 - 12.2.3.1. A Human Resources representative may attend the meeting if requested by either party.

- 12.2.4. The supervisor will provide the employee with resolution options that are aligned with organizational policies and human resources best practices.
- 12.2.5. If the employee does not agree to a resolution, the President or Executive Director and a Human Resources representative will coordinate mediation.
- 12.2.6. If a grievance involves the Executive Director, the President will consult with Human Resources and the Board of Directors as required.
- 12.2.7. If a grievance involves the President, a Human Resources representative will assist the employee with a disclosure to the Chair of the Board of Directors.
- 12.2.8. As per the **Safe Disclosure Policy**, the Students' Union shall not impose any type of negative consequence on an employee who is acting in good faith to report a grievance.

13. Performance Management

- 13.1. Performance management is a collaborative process between an employee and their supervisor with the purpose of identifying goals, expectations, and discuss priorities and concerns.
- 13.2. Supervisors will provide employees with continuous and timely performance feedback.
- 13.3. A formal performance reviews will occur at least once each year.
- 13.4. Supervisors will establish clear expectations for acceptable work performance during the annual performance review.
- 13.5. Performance management will include:
 - 13.5.1. A discussion of the employee's performance.
 - 13.5.2. Review of the job description.
 - 13.5.3. Goal setting.
 - 13.5.4. If applicable, a discussion about how the role contributes to Students' Union Ends Policy and the current operational annual plan.
 - 13.5.5. Recognition of strong performance.
 - 13.5.6. Identification of unacceptable performance.
 - 13.5.7. Guidance and resources to achieve an acceptable level of performance.
- 13.6. Employees should be given at least one (1) week notice of a performance appraisal.
- 13.7. Completed formal performance reviews shall be placed in the employee's personnel file.
- 13.8. Employees who do not meet the established expectations may be placed on a **Performance Improvement Plan**.

Performance Improvement Plans (PIP)

- 13.9. In consultation with Human Resources, a PIP can be implemented if an employee's performance requires improvement.
- 13.10. The PIP will outline specific requirements and expectations to restore an employee's performance to a satisfactory level.
- 13.11. A PIP should be no longer than three (3) months in duration.
- 13.12. The employee will be asked to sign the PIP, and it will be included in their employment file.

14. Employee Conduct Procedures

- 14.1. Conduct issues or the failure to meet employee standards or role responsibilities may result in accountability measures or sanctions based on the following framework:
 - 14.1.1. **Unsatisfactory Performance:** Failing to perform role responsibilities in a satisfactory manner as determined by a supervisor, attendance concerns, inter-personal conflicts, or minor breaches of Students' Union policies.
 - 14.1.2. **Misconduct:** An action that is contrary to the efficiency and safety of the workplace, or a significant breach of Students' Union policies.
 - 14.1.3. **Negligence:** Knowingly neglecting a duty that results in unacceptable job performance or workplace misconduct, or unwittingly performing a role at an unacceptable level.
 - 14.1.4. **Careless disregard:** Behaviour that may not meet the threshold of misconduct or negligence, but nevertheless reflects negatively on the reputation of the Students' Union or Wilfrid Laurier University.
- 14.2. Supervisors are required to do their due diligence to substantiate or confirm a conduct issue or failure to meet employee standards before proceeding with an accountability measure or sanction.
- 14.3. Accountability measures or conduct sanctions may include one of the following outcomes:
 - 14.3.1. A formal **restorative justice process** where opportunities are provided for victims, offenders, and community members affected by the incident to participate in meaningful engagement and accountability towards a goal of healing, reparation, and reintegration.
 - 14.3.2. If a restorative just process is determined to be applicable, the supervisor must consult Human Resources, the Executive Director, and the President in advance to ensure the necessary training and facilitation is feasible and justified in the context.
 - 14.3.3. **Coaching conversation.**
 - 14.3.3.1. During a coaching conversation, the employee and their supervisor will discuss how to rectify the unsatisfactory performance, misconduct, negligence, or careless disregard by identifying further training opportunities and establishing a timeframe to meet expectations.
 - 14.3.3.2. Supervisors are required to document coaching conversations resulting from specific conduct issues or failures to meet employee standards.
 - 14.3.4. **Sanction** (e.g. a verbal warning, a letter of reprimand, suspension, or revised responsibilities).
 - 14.3.4.1.1. Applicable for repeated instances of unsatisfactory performance, misconduct, negligence, or careless disregard.
 - 14.3.4.1.2. Applicable when unsatisfactory performance, misconduct, negligence, or careless disregard persists following coaching conversations.
 - 14.3.4.1.3. Supervisors will determine the suitable of a sanction, in consultation with a Human Resources representative.

- 14.3.4.1.4. A sanction may be considered without previous coaching conversations, in consultation with a Human Resources representative.
- 14.3.4.1.5. Supervisors are required to document all sanctions.

14.3.5. Termination.

- 14.3.5.1.1. Termination decisions are made by the departmental manager, in conjunction with a Human Resources representative and when necessary, the Executive Director or President.
 - 14.3.5.1.1.1. The termination of a full-time employee requires consultation with the President and Executive Director.
- 14.3.5.1.2. Termination decisions are made in consideration of and according to the Students Union's legal obligations and human resources best practices.
- 14.3.5.1.3. Termination will be considered following a series of unsuccessful accountability measures or conduct sanctions, or under the following circumstances:
 - 14.3.5.1.3.1. Discrimination based on race, citizenship, nationality or ethnic identity, place of origin, creed, gender identity, sexual orientation or preference, marital status, family status, disability, or age.
 - 14.3.5.1.3.2. Any exhibition of violence, harassment, or sexual harassment as defined in the Students' Union's Workplace Violence and Harassment Policy.
 - 14.3.5.1.3.3. Vandalizing or defacing Students' Union or Wilfrid Laurier University property.
 - 14.3.5.1.3.4. Acts of theft or fraud.
 - 14.3.5.1.3.5. Breach of confidentiality.
 - 14.3.5.1.3.6. Careless disregard that endangers the Students' Union's public image or credibility.
 - 14.3.5.1.3.7. Breaches of Students' Union policy or applicable legislation.
- 14.3.5.1.4. Termination is generally understood as a last resort after all other applicable accountability measures or conduct sanctions have been exhausted.
- 14.3.5.1.5. A termination plan will be developed by the department manager, the Executive Director, President, and a Human Resources representative.

14.3.6. The Students' Union is required to keep a confidential record of all conduct documentation for a period of seven (7) years.

15. Investigations of Employee Behaviour

- 15.1. The Students' Union will ensure that any investigation into employee behaviour is only instigated under applicable and appropriate circumstances.
- 15.2. The investigator must not be implicated in the circumstances of the investigation or under the direct control of an employee implicated in the investigation.
- 15.3. An external investigator may be retained if a conflict of interest precludes a reasonably fair internal investigation.
- 15.4. An investigation must be completed within ninety (90) calendar days unless there are extenuating circumstances warranting a longer investigation.

- 15.5. Investigations must:
 - 15.5.1. Ensure reasonable steps are taken to address confidentiality.
 - 15.5.1.1. The investigation will disclose information necessary to conduct the investigation.
 - 15.5.1.2. All participants in the investigation will be advised of their obligation not to disclose any details of the investigation and that a breach of confidentiality may result in sanctions as outlined in the Employee Conduct Procedures.
 - 15.5.2. Include interviews of all employees involved in the situation.
 - 15.5.3. Give the employee implicated in wrongdoing the opportunity to respond to the specific allegations raised.
 - 15.5.4. Interview any relevant witnesses separately.
 - 15.5.5. Include a collection and review of any relevant documents.
 - 15.5.6. Be thoroughly documented.
 - 15.5.7. Result in a written report summarizing the steps taken, the complaint, the allegations (if any), and any conclusion reached.
- 15.6. The Students' Union will ensure that the results of the investigation and any corrective action are provided to all employees directly involved.