

Staff Transition

PROCESS CHECKLIST



FIRST THINGS FIRST

Let's get started and take care of the most urgent things right now.

- Confirm Co-op Information Binder is complete and accessible and provided to lawyer as part of business continuity
- Consult with local federation for information and guidance
- Check bylaw considerations for changes of staff
- Contact your legal representative or designated confidential information holder to access necessary information for the ongoing operations of your day to day co-op business.
- Review contract for resignation/retirement notice requirements
- Determine timing of recruitment for role based on termination date
- Consider interim employment services and/or employment share with another organization
- Consider re-allocation of existing staff time and workload for temporary basis

COMMUNICATION STRATEGY

By creating a communication strategy we consider who needs to know what and how they need to receive information.

- Determine who immediately needs to be notified internally & externally
- Internally: BOD, Personnel Representative, Membership, Property Management Company (when applicable), Regional Service Manager
- External: CRA, Co-op's Lawyer, Auditor, Insurance Company, Federations, Parties engaged and/or bound to the Co-op by contract eg: Utilities, contractors, engineers, etc., Service Manager/Regulator (if applicable), Financial Institutions
- Plan and send communications to stakeholders as appropriate

RECRUITMENT PREPARATION

Let's prepare for the recruitment process with these activities to ensure that your co-op is ready to recruit its next staff member.

- Check property management contract to ensure proper notice given/received if applicable
- Establish a timeline for recruitment
- Assess the appropriateness and acceptability of direct hire vs. outsourced services
- Engage Recruitment/HR Consultant to facilitate recruitment process
- Review the needed and necessary skills/role description to update or create a job description
- Conduct a job pricing review to confirm salary scale

RECRUITMENT ACTIVITY

The process of recruitment is straightforward once you or your consultant gets started.

- Prepare job ad to post in applicable locations
 - Determine appropriate/eligible/interested internal candidates
 - Create sub-committee in preparation for interviewing shortlisted candidates
- Plan and send communications to stakeholders as appropriate

SELECTION PROCESS

Once you have completed the recruitment phase, it's time to consider who will be your next staff member.

- Work with Recruitment Consultant to select eligible candidates from applicant pool
- Recruitment Consultant conducts initial screening of candidates
- Consultant and sub-committee conducts first round interviews
- Review first round candidates to create shortlist
- Conduct final interview with shortlisted candidates to select final candidate
- Board agrees to selection of final candidate
- Design the job offer contract (with assistance from consultant and/or lawyer)
- Present the job offer to the designated candidate
- Once the offer is accepted, begin preparation for onboarding
- Communicate the upcoming change to stakeholder groups – internal/external

ONBOARDING

An intentional onboarding plan makes a big difference in the experience of a new staff member.

- Prepare a list of people and organizations for introductions to the new staff
- Create a 2 week agenda for the onboarding process including meetings, bank, passwords, and other signature obligations
- Prepare a 30 day knowledge transfer plan for the information and activities training by other staff and board for the new staff
- Introduce and refer to the Co-op Information Binder to update with any new information as a result of the hire