



Canadian Worker Co-operative Federation Employee Handbook

November 26, 2020

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Introduction

This manual applies to all staff, noting that some sections such as the Group benefits are not applicable to staff who work less than 20 hours per week with CWCF. The policies also do not apply to contracted staff excepting the Group Benefits and COLA increases which do apply, as long as such staff are contracted for at least 20 hours per week with CWCF. The Travel Policy generally applies to contractors as well, regardless of the number of hours worked, and it also applies to board members.

A. Employee Policies

1. Automatic Cost of Living Allowance (COLA) Increases

CWCF has automatic COLA increases for all staff wages with each annual budget, unless the Board decides differently. It is calculated with a single national number, as defined by the Consumer Price Index from Statistics Canada, [here](#).

2. Overtime Policy – Salaried Employees

- CWCF's salaried employees will not receive overtime pay.
- In the event that an employee is required to work in excess of their normal hours, a supervisor may approve compensatory paid leave.
- Subject to the approval of their supervisor, an employee may receive compensatory leave to a maximum of 15 days of overtime in any CWCF fiscal year (Sept. 1 – August 31).
- Overtime considered eligible for compensatory leave may only be carried over into the next CWCF fiscal year with written approval of a supervisor.
- Re: supervisor: the Executive Director reports to the Board President. If the President is concerned enough on anything to share it with the Board, s/he will do so.

(Approved by the Board on April 2006)

3. Vacation Policy – Salaried Employees

CWCF has employees in two provinces, Alberta and Nova Scotia.

The basic rules are:

- Employers must provide an annual vacation to most employees based on length of service to make sure they can rest from work without loss of income.
- Employers must give vacation time, and employees must take the vacation to which they're entitled.
- Employees must work for one year before they're entitled to vacation time.
- Employees are entitled to these minimum paid vacations:
 - 2 weeks with pay after each of the first 2 years of employment
 - 3 weeks with pay after 3 consecutive years of employment

Vacation is accrued for all employees who work 20 hours or more with CWCF. For employees with less than 20 hours per week with CWCF are paid their vacation with each pay at 4% of wages, or 6% after 3 years of employment.

For employees who are using accrued vacation, upon request, by July 31, a maximum of 10 days accumulated vacation leave may be carried from one vacation year (financial year) to the next. During the year in which employment begins, this number of days is pro-rated to the percentage of the year that was worked. (Policy approved April 2018)

Employees must request their vacation time with their direct supervisor. In most cases CWCF will be flexible to employee requests excepting the period of one month before and the month of our annual Conference/AGM or during the February to May period for RRSP staff. RRSP staff are expected to work as a team to ensure that there is always sufficient staff capacity in the office during vacation periods.

(update approved by the Board September 18, 2020)

4. Policy on Statutory and CWCF-Designated Paid Holidays

CWCF currently has employees in two provinces: Nova Scotia and Alberta. (CWCF's Communications Manager is a contractor, not an employee.) Nova Scotia has only 6 statutory holidays, and Alberta has 9. To treat staff in Alberta and NS equally, it would make sense to have the same number of statutory holidays per province. (Depending on the residence of future employees, CWCF may revise this but without a commitment to adding every possible statutory holiday, and in keeping with the financial capacity of CWCF.)

The following are paid holidays and do not require approval as leaves with pay:

a) Statutory holidays ("S" in the table below) are determined based on provincial labour legislation according to the province of employment.

b) CWCF-Designated Holidays ("C" in the table below) are statutory holidays in one province that are applied internally to CWCF staff in the other province.

*These are the days on which the organization will be closed, but it is possible for staff to swap one of the paid holiday days below for a different day off, with approval of their supervisor (*see note). Eligibility for Statutory and CWCF-Designated Holidays shall be in accordance with employment standards legislations. They are pro-rated for part-time employees.*

Holiday:	<u>NS</u>	<u>AB</u>
New Year's Day	S	S
Family day/ NS Heritage Day	S	S
Good Friday	S	S
Victoria Day	C	S
Canada Day	S	S
Labour Day	S	S
Thanksgiving Day	C	S
Remembrance Day	C	S

Christmas Day	S	S
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(Approved by the Board on June, 2019) *Note- re: Statutory swap date approved September 18, 2020

5. Travel Policy re: CWCF Staff and Board

Overview

It is the policy of CWCF to reimburse staff and board members for reasonable and necessary expenses incurred during approved work-related travel.

Note that the same policy covers staff travel, and board travel by the current board of directors. Similarly, for external contractors who are engaged in CWCF-related work, unless their mutually agreed contract requires otherwise. Note that in all cases, the traveler should verify that planned travel is eligible for reimbursement before making travel arrangements.

Travelers seeking reimbursement should incur the lowest reasonable travel expenses and exercise care to avoid impropriety or the appearance of impropriety. Reimbursement is allowed only when reimbursement has not been, and will not be, received from other sources. If a circumstance arises that is not specifically covered in this travel policy, then the most conservative course of action should be taken.

Travelers on CWCF business should also be mindful of carbon emissions, and use electronic meetings, and for physical meetings use the most environment-friendly form of transportation possible.

Authorization and responsibility

Staff and board travel must be authorized. Travelers should verify that planned travel is eligible for reimbursement before making travel arrangements. Within 30 days of completion of a trip, the traveler must submit a travel reimbursement form and supporting documentation to obtain reimbursement of expenses.

An individual may not approve his or her own travel or reimbursement. The travel reimbursement form must be approved by their supervisor, the Executive Director or in the case of the Executive Director by another senior staff or board executive.

Vacation in conjunction with business travel

In cases in which vacation time is added to a business trip, any cost variance in airfare, car rental or lodging must be clearly identified on the Expense form.

Travel Time with regard to Staff

CWCF pays all time required for business travel for staff, door to door up to a maximum of 8 hours/ day. If less than 8 hours, CWCF pays for the actual time spent in transit.

Conference registration fees. Conference registration fees can be prepaid with a credit card or cheque through the bookkeeping office with a request for payment form. Business-related banquets or meals that are considered part of the conference can be paid with the registration fees; however, such meals must be deducted from the traveler's per diem allowance.

Reimbursements

Requests for reimbursements of travel-related expenses are submitted on an Expense Form. Board expense forms are different to staff expense forms. Reimbursement of travel expenses is based on documentation of reasonable and actual expenses supported by the receipts wherever required. Reimbursements that may be paid by CWCF are shown below.

Automobile (personally owned—domestic travel). Drivers should be aware of the extent of insurance coverage (if any) provided by his or her automobile insurance company for travel that is business or not personal in nature.

Reimbursement for use of a personal automobile is based on the CWCF mileage rate at \$0.38 per kilometre. (reviewed annually.)

Automobile (rental—domestic travel). Reimbursement for a commercial rental vehicle as a primary mode of transportation is authorized only if the rental vehicle is more economical than any other type of public transportation, or if the destination is not otherwise accessible. Vehicle rental at a destination city is reimbursable. Receipts are required.

CWCF authorizes reimbursement for the most economic vehicle available. In certain circumstances larger vehicles may be rented, with supervisory approval. The rental agreement must clearly show the date and the points of departure/arrival, as well as the total cost. Drivers must adhere to the rental requirements, and restrictions must be followed. Receipts are required.

When vehicle rentals are necessary, CWCF encourages travelers to purchase collision damage waiver (CDW) and loss damage waiver (LDW) coverage. CWCF will reimburse the cost of CDW and LDW coverage but not other types of insurance.

Travelers are strongly encouraged to fill the gas tank before returning the vehicle to the rental agency to avoid service fees and more expensive fuel rates.

Lodging (commercial). The cost of overnight lodging (room rate and tax only) will be reimbursed to the traveler if the authorized travel is 70 kilometres or more from the traveler's home or primary worksite, unless specifically approved by a supervisor.

CWCF will reimburse lodging expenses at reasonable, double, single occupancy or standard room rates. When the hotel or motel is the conference or convention site, reimbursement will be limited to the conference rate, and depending on the rate of the convention site hotel CWCF may ask its participants to stay at a lower cost hotel, where reasonable. Shared

accommodations are encouraged when possible to reduce the overall expense. CWCF will only cover the portion for CWCF participants.

Meals (per diem). Per diem allowances are reimbursable for overnight travel that is 70 kilometres or more from the traveler's home or primary worksite.

Breakfast	15.00
Lunch	20.00
Dinner	<u>35.00</u>
Total	70.00

Meals provided through accommodations, at meetings, etc. will not be reimbursed, and it is acknowledged that in some cases it may not be possible to stay within the per diem allowance for meals organized by CWCF management for groups. Receipts are not required for per diem allowances. Per diem allowances are reimbursed after the trip is completed.

Parking. Receipts are required for parking fees (including airport parking) or more. The lodging bill can be used as a receipt when charges are included as part of the overnight stay.

Tolls. Receipts are required for tolls.

Miscellaneous transportation. Receipts are required for taxi, bus, subway, metro, ferry and other modes of transportation.

(Approved by the Board on September 18, 2020)

6. Personal Leave Policy or Paid Time Off (PTO)

1. Paid time off is provided for a short-term period of absence which can be used in any of the following situations:
 - a. Employee is incapable of working as a result of illness, injury or stress.
 - b. Employee needs to deal with a personal issue or family issue and needs time to do that
 - c. Employee needs a personal rest day
2. Paid time off is calculated by pay period at the equivalent of $\frac{1}{2}$ of a day for each month assuming full time is 35 or more hours per week. This will be prorated for staff who work less than 35 hours per week as follows:
 - a. Percentage of a 7-hour day for each month allocated = (Number of hours worked by a part-time employee / 35) X .5
3. The accrued maximum days are 5 days per the prior 12 months, prorated for part-time employees.
4. Days not used in the prior 12 months will be carried forward up to the maximum of 5 days, but beyond this PTO credits cannot be accumulated. The number of PTO credits available in each period of 12 consecutive months is determined on a rolling basis, with a new 12-month period beginning on the first day of each calendar month.
5. In order to access PTO the employee should inform their direct supervisor. Neither medical documentation nor reason for absence is needed unless more than three consecutive PTO days are taken/requested. It will be at the discretion of the supervisor as to what documentation to request.

In the case of the Executive Director, it is the Executive Committee which will be notified of the absence and which will make the judgment call.

6. If the employee has insufficient PTO credits to cover a period of leave then with the approval of the Executive Director, the remaining time may be taken as vacation and/or leave without pay. In the case of the Executive Director it will need the approval of the Executive Committee.
7. PTO credits have no cash value either during or upon termination of employment.

(Approved by the Board in September 2019)

B. Group Benefit Plan

CWCF provides staff that work 20 or more hours per week¹, after working at CWCF for six months, with a comprehensive package of group insurance benefits provided through The Co-operators Life Insurance Company. This group benefit plan provides valuable security in the event of sickness or death.

Employees co-share this benefit cost by paying 100% of their Life and Accidental Death and Dismemberment premiums and 30% of the Extended Health and Dental Care premiums.

The CWCF plan includes the following types of coverage:

- Basic Life Insurance
- Accidental Death and Dismemberment Benefits
- Dependent Life Insurance
- Extended Health Care Benefits (Including prescription drug plan and extended health care (Acupuncturist, Chiropractor, Massage, Naturopath/Homoeopath, Nutritionist/Dietitian, Occupational, Physiotherapist, Podiatrist/Chiropodist, Psychologist/Social, Speech Therapist)
- Dental Care

CWCF is responsible for making sure that all employees are covered for the benefits they are entitled to by submitting all required premiums, reporting all new enrolments, terminations, any salary or benefit changes and by keeping all records up to date.

As a member of this Group Benefit Program, it is up to staff to provide CWCF with the necessary information to perform such duties.

(Effective September 1, 2018)

C. Retirement Benefit (Group RRSPs/TSFAs) *(new, 2020-2021)*

CWCF has instituted a new retirement benefit plan for employees who are employed with CWCF. The plan will be administered by The Co-operators with the availability of fossil fuel-free funds in the near future. All staff who are employed with CWCF for 20 or more hours per week will be enrolled in this Retirement Benefit.

¹ This also applies for contract staff who are contracted for at minimum 20 hours per week.

- a. CWCF will contribute between 1% and 3% of salary for each employee being paid for at least 20 hours/ week to Group RRSP's or TFSA's. CWCF will contribute the first 1% regardless of whether the employee matches it and CWCF will pay up to 3% if the employee matches the amount CWCF contributes. Staff could of course also contribute more, but nothing beyond the first 3% total would be matched by CWCF.
- b. An equivalent financial benefit which as agreed by the CWCF HR Committee will be provided to contract staff who are contracted for at least 20 hours per week.
- c. There will be education done for staff re: retirement planning. This would be in part to encourage staff to find a way to contribute a minimum toward their own retirement, at least 3% (getting them 6% savings), and ideally more. There would also be an element of education regarding the choice between RRSP's or TFSA's.
- d. CWCF (via the HR committee) will decide on the fund selection.

(Approved January 2020)

D. Staff Confidentiality Agreement

CWCF STAFF MEMBER CONFIDENTIALITY AGREEMENT

Canadian Worker Co-operative Federation

RE: Undertaking Concerning Confidentiality

I have agreed to act as a staff member of the Canadian Worker Co-operative Federation. In this capacity I acknowledge that I will have access to confidential information concerning the Co-operative movement and its members.

As part of my duties, I undertake not to disclose, either now or in the future, except in the proper course of my duties, to any person, firm or corporation, any information concerning the personal, financial or other affairs of persons or corporations dealing with the Co-operative which information I may acquire during the course of or incidental to my activities as a staff member.

Staff Member

Name: _____

Signature: _____

Dated this ____ day of _____ 20__

E. Protocols for Working from Home (RRSP/TSFA staff)

CWCF RRSP/TFSA PROGRAM STAFF PROTOCOLS FOR WORKING FROM HOME

In addition to the confidentiality agreement that you must adhere to under the terms of your employment with the Canadian Worker Co-operative Federation, the following precautionary measures are required to be taken when working from home at any time.

1. Removing any sensitive documents from the RRSP/TFSA Program office – including, but not limited to, RRSP/TFSA annuitant files and cheques:
 - The File Sign-Out Form (located on Dropbox) must be updated to include all files being transported offsite and updated again when the files are returned to the office.
 - Client records and laptops are not to be left in unattended vehicles whenever avoidable and shall never be left unattended in a vehicle overnight.
 - Client information should be kept out of sight when working from home. If possible, store files in a secure location when not in use.
 - Family members, including spouses and children, are not to have access to CWCF office equipment (e.g. laptops).
 - If available, a secure carrier such as a locked briefcase should be used to transport client files to and from the office.
2. Using personal computers for CWCF work and/or using CWCF laptop computers at home.
 - All computers/devices being used for CWCF work off-site should use strong passwords on the entry screen. Use at least 8 letters, include at least 1 number and 1 symbol. Use words you can remember but others will find hard to guess.
 - Ensure that there is a short window of time (recommended to be no more than 10 minutes) before the screen shuts down (or screen saver) which requires a password to restart. This ensures that if you leave the computer unattended, someone else can't access it.
 - Ensure that all systems have updated operating systems which will include security fixes. All computers used for RRSP work will have security and monitoring set up by Triple E.
 - Use only secure private internet access; particularly when accessing sensitive information such as RRSP data, banking or the Concentra system. If public access is used at any other time be sure to close the connection when you are done.
 - Do not let others use the computer unless you have first closed and logged out of any sensitive applications or files and ideally password protected any office files on the computer. CWCF computers should not be used by anyone except staff.
 - If you believe that a security issue has occurred you are obligated to report this immediately to CWCF by informing both the RRSP Manager and the Executive Director, and to Triple E. You must document what happened, what you think was accessed and by whom if you know.

- If there are additional expenses incurred as a result with working from home, staff are encouraged to discuss this with their supervisor. This may include use of personal cell phone, internet, use of personal printer, etc.

I agree to take all precautionary measures listed above, as well as, any additional measures I feel are necessary to ensure the security and confidentiality of any sensitive information I may have in my possession outside the office. I understand that if there are extenuating circumstances that prevent any of these measures from being taken, I should discuss the situation with my supervisor before bringing any information, documents or a CWCF laptop offsite.

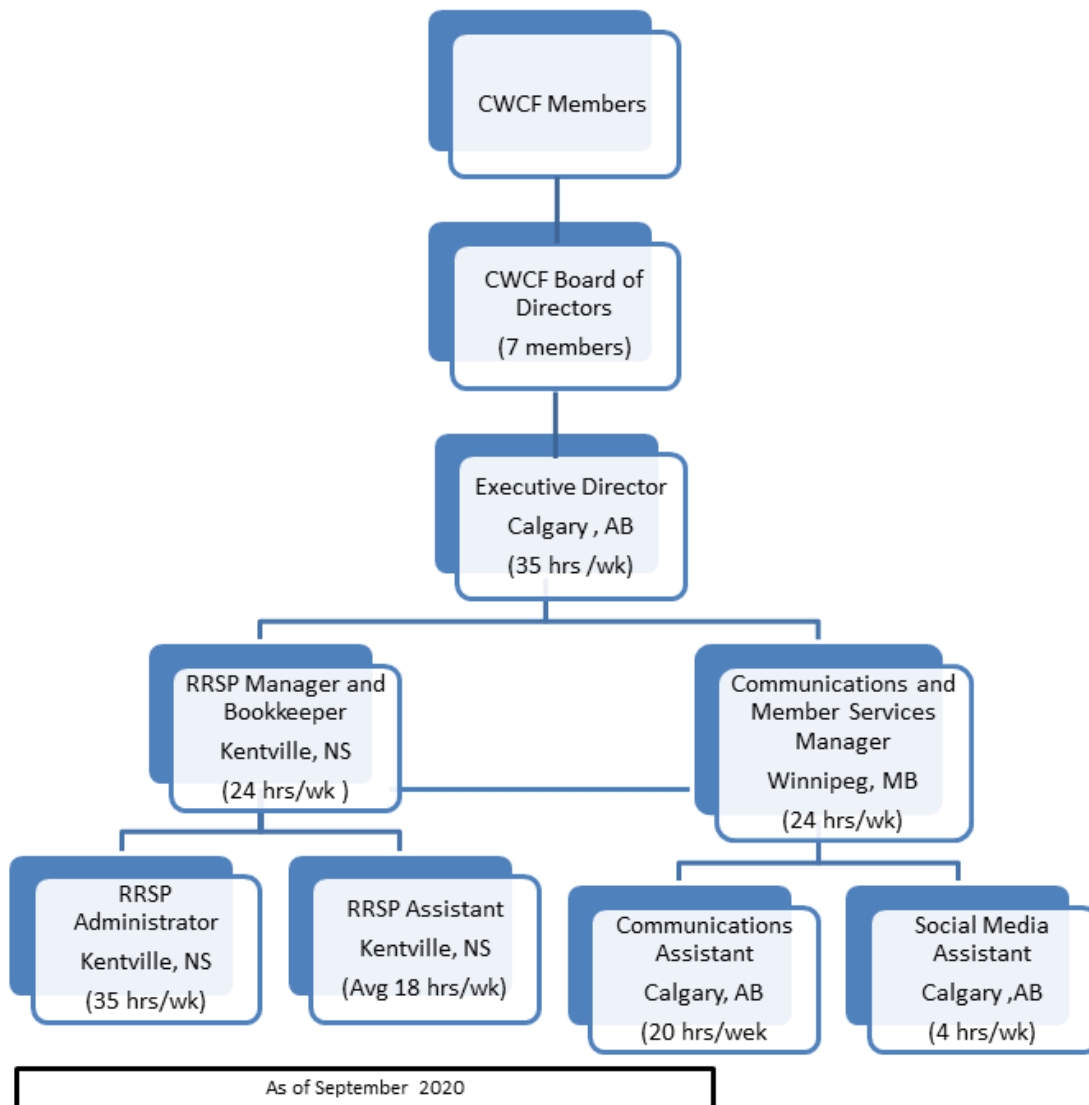
Signed: _____
(staff member)

Dated this ____ day of _____, 20____.

(Approved by the Board on September 18, 2020)

F. Organizational Chart

CWCF Organizational Chart



G. Work Hours

Although there are no fixed standard work hours and because employees are geographically located across three different provinces and time zones; there is a need for staff members to have a general awareness of the availability of other staff and their typical hours. This is more significant for supervisory roles and the staff which report to them. Generally employees are expected to be available during weekdays between 9 am and 5 pm for as many hours as they are contracted. However; other or flexible work schedules are acceptable as long as this has been discussed and agreed to by the employee's supervisor.

It is expected that employees may need to adjust hours as/if needed to accommodate meetings given the time zone challenges. The nature of this set-up requires that employees are self-motivated and able to schedule their own work within the number of hours they are required to work according to their employee agreement. If an employee consistently is unable to complete the required work within the time they have, they are encouraged to speak to their supervisor.

Given the independent nature of work, employees may find themselves working on weekends or holidays. Typically this is to be discouraged except in rare situations when it may be required.

H. Staff Meetings

There will be one all-staff meeting by Zoom once a month. This is a time when staff have an opportunity to update each other and to generally get to know each other better. The meetings are planned to last one hour and follow the following agenda. Employees are encouraged to prepare their update in advance.

- Check In
- Brief updates
 - What have we been working on?
 - What is coming up?
 - What is going well?
 - Challenges
- Set the date for the next staff meeting.

There are also periodic meetings held for the RRSP-TFSA program staff, Bookkeeping staff, and Communications staff, typically once per month.

There will be one annual in-person staff meeting usually, in August. The location for this meeting will typically be where it is most convenient for all staff. While the meeting may run over two days, not all staff would need to be in attendance for the full time as some topics are less pertinent for some staff. Generally this time will also include a staff leisure activity to enhance team building and working relationships. The agenda for this in-person meeting will vary but would include a general check-in, opportunities to share and possibly a learning activity. In addition there will be topics to include bookkeeping, audit planning, conference update/planning, RRSP/TFSA program meeting, and others as necessary.

Accommodations and travel to/from this meeting will be covered by CWCF.

I. Staff Expenses and Time Reporting

All employees with the exception of the Executive Director are expected to maintain a time report that the bookkeeper and their supervisor can access. The format of the report is set up individually with input from the employee, supervisor and bookkeeper. CWCF pays its employees twice monthly on the 15th and the 30th (or last day) of every month. Pay is by direct deposit. The bookkeeper will provide the forms required to get the direct deposit set up.

CWCF will reimburse employees for expenses that are incurred for CWCF business. Staff should ask their supervisor for authorization regarding expenses prior to making the purchase. To obtain reimbursement, an employee expense form must be completed and submitted along with the appropriate receipts to both the bookkeeper and supervisor. In the case of the Executive Director, expenses may be incurred as long as within budget and relevant policies, and for significant purchases after consultation with the Communications Manager. Where a discretionary expense is materially beyond budget, the ED must first seek approval from the Executive Committee of the board. The ED must submit expense forms along with the appropriate receipts to the bookkeeper and the Communications Manager.

J. Performance Evaluation

Each employee will undergo an evaluation once a year. Typically the process will be launched in May with individual review meetings happening in July/August. Each employee will receive a set of instructions, and self-evaluation materials and will be requested to complete these. Note that their supervisor will also complete the same forms. A meeting is set-up where the employee and their supervisor discuss the evaluation and document the results in a review form that the employee will then review and comment on and/or sign. This is a confidential document which is retained in the employee's file. There is a separate process for the Executive Director which is managed by the Board's HR Committee and which includes a 360-degree, all-employee element in at least some years.

New employees will also have a 3-month review with their supervisor.

K. Employment Agreements

Each employee will receive and be expected to review and have the opportunity to ask questions about their employee agreement. This will then be signed and maintained in the employee's confidential employment file. The employment agreement along with relevant employment standards and this handbook form the basis on which the employee is expected to perform.

The employee agreement includes information about employment conditions, hours of work, location, wages and a complete job description.