

HUMAN RESOURCES TOOLKIT


A simple suite of Human Resources tools developed specifically for financial services businesses covering all HR requirements within your business.

So what's covered?

Our HR Toolkit is made up of 8 sections:

1. Introduction to People Management
2. People Management
3. Recruitment & Selection
4. Induction
5. Performance Management
6. Employment Separation
7. Occupational Health & Safety
8. Risk Mitigation

Our complete toolkit covers all your HR needs including Organisational Structure, Position Descriptions, Letters & Forms, Policies, Remuneration Modelling and Risk Mitigation.

Our HR Toolkit has been developed in conjunction with balanceatwork

The Encore Group Pty Ltd

www.encoregroup.com.au
NSW/ACT
VIC/TAS
WA/SA

Ph: 1300 780 730
Level 11, 153 Walker Street
GPO Box 1484
Suite 16, 123A Colin Street

Fax: 1300 780 838
North Sydney NSW 2060
Melbourne VIC 3001
West Perth WA 6005

HUMAN RESOURCES TOOLKIT

A simple suite of Human Resources tools developed specifically for financial services businesses that can be used in isolation on an 'as needs' basis, or in its entirety to implement the complete HR requirements within the business. These tools are developed in Microsoft Word, Excel and Powerpoint, so they can be easily accessed and modified by the business if required. They cover the following:

SECTION	TOOLKIT COMPONENTS	DETAIL
1. INTRODUCTION TO PEOPLE MANAGEMENT	1.2 Human Resources Management Overview	A simple Guide to assist in understanding Human Resource Management. <ul style="list-style-type: none"> - HR Management Introduction - HR Policies Fact Sheet
2. DEVELOPING A PEOPLE PLAN/STRATEGY <i>(Planning)</i>	2.1 HR Audit	Identifies Human Resource strengths and weakness via: <ul style="list-style-type: none"> - an Internal Audit questionnaire - Staff Feedback Workbook - Role Clarification questionnaire - Staff Skills Questionnaire
	2.2 Organisational Structure	A document that provides background on this topic and <ul style="list-style-type: none"> - Sample structure diagrams (ppt). - Organisational culture
	2.3 Position Descriptions	Position description templates detailing: core responsibilities, competencies, KPIs / performance standards, qualifications and experience for: <ul style="list-style-type: none"> - Owner/Adviser, - Practice Manager, - Salaried Adviser, - Paraplanner, - Advice and Technical Support Manager, - Client Service Manager, - Client Service Officer, - Receptionist and - Administrator - Template

3. FINDING THE RIGHT PEOPLE <i>(Recruitment and selection)</i>	Selection-Recruitment Process	Documents to assist with the selecting and recruiting the right person for the role that you have. <ul style="list-style-type: none"> - Selection & Recruitment Process - Overview - Role Clarification Questionnaire - Using recruitment agencies - Reference Checking Checklist - Behavioural Based Interview Guide - Interview Agenda - Candidate Rating Sheet - Resume Vetting Checklist
	Forms & Letters	Generic letters of offer & contracts <ul style="list-style-type: none"> - Letter of appointment (adviser) - Letter of appointment (non-adviser) - Letter of Offer – One page generic - Unsuccessful candidate letter
4. ESTABLISHING STAFF EXPECTATIONS <i>(Induction)</i>	Induction	Documents to assist with the commencement of a new employee to the business <ul style="list-style-type: none"> - Employee commencement details - Induction checklist - Example Induction program - One week induction agenda
	Office Manual	Simple Office Manual template that documents the standard HR and business policies and procedures. <ul style="list-style-type: none"> - Office manual template - Employee Manual template
	Policies	<ul style="list-style-type: none"> - Study Policy - Parental Leave - Sick Leave - Special Leave (Jury duty etc) - Harassment - Alcohol & Other Drugs - HIV - EEO - Grievance - Internet and email use - Code of conduct - Performance Management - Disciplinary Policy

	Forms & Letters	<ul style="list-style-type: none"> - Manager of new employee checklist - New employee checklist - Probation assessment form - Successful probation advice
<p>5. MANAGING, MOTIVATING AND RETAINING <i>(Performance management)</i></p>	Performance Management	<ul style="list-style-type: none"> - Management performance Issues - Performance Review Template 1 - Daily Activity Report Template 1 - Daily Activity Report Template 2 - Adviser Activity KPI Tracking Worksheet
	Remuneration Modelling	<p>A variety of simple calculators (Excel) to predict adviser and staff remuneration and profitability based on a variety of options in a remuneration package, with the ability to scenario plan.</p> <ul style="list-style-type: none"> - Adviser remuneration & incentive model - Profit share models – 4 Options
	Incentives	<p>Outline of how to develop and manage a staff rewards and incentive scheme</p> <ul style="list-style-type: none"> - Staff Incentive Scheme Example - Staff Incentive Program calculator - Staff Performance Review Calendar - Staff KPI's – Example list
	Forms & Letters	<ul style="list-style-type: none"> - - Staff Training Calendar Template - Internal Staff Communication Calendar Template - Staff Training Plan Template - Individual training plan proposal - Staff Training Record Template - RG146 training requirements - Managing Performance Checklist - Application for leave form - Reimbursement of expenses form
<p>6. EMPLOYMENT SEPARATION</p>	Employment termination	<ul style="list-style-type: none"> - Redundancy Information - Redundancy Article – Do the right thing
	Forms & Letters	<ul style="list-style-type: none"> - Disciplinary meeting checklist/agenda - First warning letter - Further warning letter - Final warning letter - Dismissal letter - Record of disciplinary interview

		<ul style="list-style-type: none"> - Staff exit checklist - Sample exit questions - Exit evaluation form - Certificate of service - Retrenchment letter
<p>7. OCCUPATIONAL HEALTH AND SAFETY</p>		<ul style="list-style-type: none"> - General OHS policy, including responsibilities - Emergency evacuation - First Aid - Rehabilitation - Workers compensation
<p>8. RISK MANAGEMENT</p>	<p>Risk Mitigation</p>	<p>Simple tools to assist to meet operational legislative requirements</p> <ul style="list-style-type: none"> - Quantifying risks - Site inspection checklist - Minimisation plan (xls)