

FACILITY MANAGEMENT MANUAL

3 Human Resources



Commissioned by: Sport New Zealand (Sport NZ), with support from New Zealand Recreation Association (NZRA), Exercise Association of New Zealand and Entertainment Venues Association of New Zealand (EVANZ)

Authors: Robyn Cockburn, Trish Amos, Lucy Atkinson, Esther Bukholt and Marilyn Northcotte, Lumin

June 2015

ISBN 978-1-927232-47-7

The Facility Management Manual has been developed for managers of any recreation, sport or leisure facility. It provides detailed information covering the management and operation of a recreation, sport or leisure facility.

This document is a companion document to the Aquatic Facility Guideline, which can be found on the Sport NZ website and the NZRA website:

<http://nzrecreation.co.nz/index.php/facilities-home/facilities-guidelines>

Acknowledgements

Caroline Ancell, Powerco Aquatics, Hawera; **Simon Battrick**, Christchurch City Council; **Richard Beddie**, Exercise New Zealand; **Brian Blake**, The Trusts Stadium; **Ross Blanch**, Rolleston Community Centre; **Tracy-Lee Burkhart**, Consultant; **Penny Claridge**, Skills Active; **Charlie Cordwell**, Tennis Central; **Anita Coy-Macken**, Auckland Council; **Miles Davidson**, EVANZ; **Garth Dawson**, Outdoors NZ; **Jamie Delich**, Sport NZ; **Arvid Ditchburn**, YMCA Auckland; **John Freer**, Boulcott Farm Heritage Golf Course; **Craig Goodall**, RFA The Edge; **Matt Greenwood**, Waimakariri District Council; **Grant Helleur**, YMCA Auckland; **Richard Hollier**, Auckland Council; **Craig Hutchings**, Wellington Regional Aquatic Centre, Wellington; **Andrea Jackson**, Masterton District Council; **Rachel Jury**, H²O Xstream, Upper Hutt; **Rob Kennedy**, Sport Tasman; **Kirsty Knowles**, CLM; **Carolyn Lamond**, YMCA Christchurch; **John Latimer**, CLM; **Alison Law**, Kapiti Coast District Council; **Justin Leydesdorff**, Papatoetoe Sports and Community Charitable Trust; **Richard Lindsay**, Sport NZ; **Scott Linklater**, Whangarei Aquatic Centre; **Brent Maru**, Sport Tasman; **Jody Maru**, Motueka Recreation Centre; **Grant McLean**, Sport NZ; **Christine Mercer**, Otahuhu Recreation Centre; **Brian Milne**, Xyst; **Kathy Moore**, Selwyn District Council; **Gareth Moore-Jones**, Ideaus; **Virginia Munro**, Wellington Regional Aquatics Centre; **Tracey Prince**, NZRA; **Brendon Rope**, Pettigrew Green Arena; **Des Smith**, New Zealand Secondary School Sports; **Grant Stewart**, Jetts Fitness; **Pete Thompson**, Splash Palace Invercargill; **Judy Tipping**, Aquatic Consultant; **Lisa Tocker**, Auckland Council; **Julian Todd**, Wellington City Council; **Georgie Witihera**, Auckland Council.

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1 Introduction

People are at the heart of any well run facility. Staff have an enormous impact on users and on the atmosphere of a centre. Recruiting, selecting, inducting, managing, and training the right team of people, and recognising and valuing their skills, are all key factors in setting up and maintaining a successful facility. This section provides an overview of the human resource management process, from recruitment through induction, training and on-going staff performance and management of staff.

This section links with the following Facility Management Manual chapters:

Chapter 1 - Community Engagement

Chapter 2 - Customer Care

Chapter 8 - Risk Management

1.1 Legal and statutory requirements

The following laws and standards are relevant to the responsibilities and accountabilities of facility managers in staff recruitment and management:

- Accident Compensation and Rehabilitation Insurance Act 2001
- Employment Relations Act 2000
- Equal Pay Act 1972
- Health and Safety in Employment Act 1992, 2003
- Holidays Act 2003
- Human Rights Act 1993
- Industry Training Act 1991
- Minimum Wage Act 1983
- Official Information Act 1982
- Parental Leave and Employment Protection Act 1987
- Privacy Act 1993
- Volunteer Employment Protection Action 1973
- Wages Protection Act 1983
- New Zealand Injury Prevention Strategy
- 90 day trial laws

Further information

<http://legislation.govt.nz>

1.2 Policies

All facilities should have policies relating to human resource processes. These could include but are not limited to:

- Employee code of conduct
- Employment agreements
- Equal employment policy
- Employee exit strategies
- Recruitment policy
- Health and safety policies
- Leave policy (including holiday, bereavement, parental, sick, special)
- Induction process
- Learning and development policy
- Pay and performance policies
- Performance management policies (e.g. performance improvement process, misconduct policy)
- Restructuring and redundancy policy
- Union membership rights.

2 Reviewing Performance

2.1 Self-review

Prior to using this chapter, do a quick check on the facility and how well it is managing its human resources.

Human resources self-review

Description	Self assessment
<i>Role analysis</i> <ul style="list-style-type: none">All facility roles (including volunteers) have been analysed and skills, knowledge and key responsibilities written into a role description.	
<i>Recruitment</i> <ul style="list-style-type: none">There is a recruitment strategy for all new rolesAll staff have an employment agreementAll new staff are inducted.	
<i>Staff management</i> <ul style="list-style-type: none">Delegation is managed and reviewedRegular team meetings are held and decisions acted onAll staff have career development goals.	
<i>Staff performance management</i> <ul style="list-style-type: none">All staff have set performance objectives and targetsAll staff are reviewed regularly against their performance objectives and targets.	
<i>Learning and development</i> <ul style="list-style-type: none">All staff have learning and development plans.	

2.2 Key performance indicators

Area	Indicators	✓
Staff levels	<p>FTE levels maintained to specified level and ensure safe and efficient operation of facility.</p> <p>Total staff cost as a percentage of revenue.</p>	
Staff satisfaction	<p>Staff are engaged.</p> <p>Staff are satisfied with opportunities for development.</p> <p>Percentage of staff retained annually.</p>	
Managing staff performance	<p>Staff are actively managed through a professional development process.</p> <p>Managers act promptly and appropriately to performance issues.</p>	

3 Effective Recruitment

Employing the right people with the right attitude will make the facility run smoothly and provide a positive customer experience. Recruiting the right staff requires good planning and sound management skills. A critical skill in the recreation sector is a strong customer focus. While many customer service skills can be developed, fundamental attitudes are usually well established by the time people are employed. The key is to find 'people-people' whose values match those of the organisation and facility, who will bring the right attitude, fit with the team and have the technical skills required.

Recruiting and selecting good staff is worth prioritising and spending quality time on. It involves six key steps, all of which need time and resources.



3.1 Role analysis

Fundamental to managing people is understanding the role they are employed to perform.

A role analysis involves developing a full description of the tasks, skills, values, attitudes, philosophy and knowledge needed to perform the work to the standard required.

Conducting a role analysis is the basis of creating a good role description. It can be time consuming, but the process provides good quality information to guide recruitment, performance management and training related decisions.

Role analysis

Steps	Action
<i>Describe the work context</i>	<ul style="list-style-type: none"> • Include information about the organisation or facility • Identify relationships involved with the position
<i>Identify key tasks and work standards</i>	<ul style="list-style-type: none"> • Interview people from work context to identify tasks • Identify standards of work • Non-negotiable skill requirements • Skills, knowledge and experience required
<i>Develop description</i>	<ul style="list-style-type: none"> • Competency statements containing skills and knowledge • Performance objectives • Size the role: full-time, part-time, casual • Type of contract: fixed-term, short-term, permanent • How it links to business plans and strategy

3.2 Role descriptions

A good role description includes key points detailing what the role entails. It will include:

- Role title
- Key tasks and areas of responsibility
- Person specification – which may include qualifications, experience, skills, interests or attitudes
- Reporting lines
- Expectations of performance – usually detailed for staff employed on contract for a specific piece of work
- Key work relationships
- Conditions of employment.

Template: Operations Manager role description
Recreation Centre Assistant goals and responsibilities

3.3 Identifying critical factors

Identifying factors critical to the position greatly increases the likelihood of a suitably skilled and experienced person being selected for the role. Once the critical factors have been identified, this information can be used to prepare an applicant screening matrix. Ask the following questions to identify the critical factors:

- What areas must the candidate demonstrate competency in immediately?
- If the candidate could show competency in only one area, what would it have to be?
- Which skills are not essential, but it would be nice for the candidate to have them?

3.4 Planning a recruitment strategy

The aim of recruitment is to identify and attract people who are interested in and capable of filling a vacancy. The following questions will be useful as a guide to developing a recruitment strategy.

- What are the characteristics of the applicants required?
- How many applicants must be attracted to ensure a sufficient pool of applicants?
- What are the suitable methods for advertising and communicating the vacancy? What is the cost, timeframe and other requirements for information? Consider advertising at the facility or through social media. Customers may become great staff.
- What does the facility and position offer that will attract applicants. Can it be included in the advertisement and/or supporting information?
- How will the facility manage any interim period without an employee?

From this, a recruitment plan can be created, which is designed to find the best possible candidate for the role.

There are some distinct phases in the recruitment process and each of these take time. An indicative timeline is presented in the following table. This can be used to plan a recruitment timetable.

Recruitment phases

Timeframe	Actions	Who
Week one	<ul style="list-style-type: none"> • Person specification completed using position description • Prepare advertisements and promotion and obtain necessary approvals • Application information prepared • Enquiries contact person identified • Advertisements placed in appropriate media 	
Week two	<ul style="list-style-type: none"> • Enquiries received and application information sent out, emailed or downloaded • Interviewers to meet or teleconference • Shortlisting criteria developed • Interview questions developed based on person specifications 	
Week three	<ul style="list-style-type: none"> • Applications returned by deadline • Interviewers to review applications and create interview shortlist • Candidates contacted for first interview 	
Week four	<ul style="list-style-type: none"> • Interviews conducted • Shortlist applicants for second interview if required and candidates contacted • Interview two conducted • Referee and police checks conducted 	
Week five	<ul style="list-style-type: none"> • Successful candidate contacted • Official 'offer of employment' letter sent • Signed 'offer of employment' letter returned • Unsuccessful candidates contacted 	
Week six – ten	<ul style="list-style-type: none"> • First day of employment! 	

Template: Recruitment phases

Note: if an employee gives two weeks notice, and it takes ten weeks to fill the position, ensure there is a plan to cover the interim period.

- Is there enough staff available to cover?
- Can temporary staff cover the position?
- Will a programme or service continue without someone in this role?

3.5 Recruitment advertising

The purpose of recruitment advertising is to attract quality applicants who are suited to the facility and the role. There are a range of methods for delivering the recruitment message to the right type of candidate, each of which have their own strengths and weaknesses. These can include internal channels, partnerships, networks and online channels.

Internal channels

- Incentives for staff and facility members to refer potential applicants
- Have a recruitment page on the facility website
- Post advertisements on facility notice boards and organisational e-news
- Consider succession planning, a process whereby the skills and knowledge of staff are developed to prepare them for advancement to the next position. This ensures the potential of staff is developed and there are employees skilled and able to fill new roles.

Partnerships

- Partner with other recreation providers to share employment opportunities
- Establish links with tertiary education providers to access graduates
- Offer study, internships or work experience placements to trainees and students.

Networks

- Advertise in the appropriate e-newsletters (e.g. Active Thinking) and related websites (e.g. Sport NZ, NZRA Vacancies)
- Link with child-focused community groups when looking for part-time staff (e.g. playcentre, kindergarten or school newsletters, playgroups)
- Identify other local community groups who have members with the required skills, attitudes and attributes e.g. cultural centres, sports groups, venue hirers
- Advertise through customer networks
- Link with training organisations such as Skills Active, Exercise Science Courses etc
- Ask key staff to promote through their networks.

Previous applicants

- Keep a record of previous applicants that could add value to the facility, including internal applicants. Contact them when the “right” vacancy comes up.

On-line channels

Traditional advertising sources are being replaced by online advertising where role descriptions can be downloaded, and applicants can apply directly online and upload files and documents such as CVs and role descriptions. Seek, Trade Me and NZRA Vacancies all provide services in this area. On-line channels can also match potential candidates with vacancies.

3.6 Screening candidates

The process of screening candidates can be broken down into four distinct activities. They include choosing the selection panel, planning the selection process, shortlisting, interviewing and assessing candidates.

The selection panel

Having the right mix of people on the selection or interview panel is important to the interview process. Ensure the panel can make themselves available through the entire process to provide consistency and fairness to the candidates.

An interview panel should consist of three to four people. When choosing panel members, consider the following attributes. One person may be able to cover several of the specifications listed:

- Select people with the interviewing, questioning, listening and observing skills that makes a good selector
- Include the person who will have direct management responsibility for the position
- Include someone with specific expertise related to the position
- Include someone who can retain a degree of objectivity and see the 'big picture' if there are differences of opinion
- Include someone who can act as an organisational culture reflector.

Plan the selection process

Planning is important to ensure consistency and coherence throughout the selection process. The selection panel must understand the relevance of the critical selection factors and there must be agreement between panel members as to what those are. Making time to discuss critical and non-essential factors, and to plan the interview and selection process will be time well spent. Remember to document all decisions and use these as the basis of shortlisting and selection.

Shortlisting and screening applicants

Shortlisting is undertaken by reviewing the applications and identifying candidate's possessing the critical factors. Those without the agreed critical factors are eliminated at this stage.

To save time, it may be worth considering a process that enables a first level selection, either through written applications or telephone screening. Consider giving candidates a pre-selection questionnaire or activity, which they send in with their application. This can help check whether the candidates have the critical skills required.

A recommended number of shortlisted candidates is between three to five.

Template: Shortlist matrix

Plan interview activities and questions

Prior to the interview, the interview panel should agree on the interview format, identifying who asks the different questions. Structure questions from easy and non-threatening to more complex questions and ensure all candidates are asked the same questions. Open-ended questions should be used, avoiding those that can be answered with yes or no.

Design questions using the person specification and choose one or two questions for each key area. Concentrate on the 'must haves' identified in the person specification. Prepare two types of questions – behavioural questions and a role simulation scenario or situational questions.

Behavioural interviewing asks questions about past behaviour as a predictor to future behaviour. In this type of questioning, an applicant is asked to describe specific events in the past, what occurred, how they reacted and the outcome.

Role simulation should be used where possible e.g. when interviewing for a fitness trainer have the applicant design a programme. Take the applicant into the gym and ask them to demonstrate a series of exercises with a 'client'. Inform the candidate prior to attending the interview if they will be required to complete a simulated task. If this is not possible, ask candidates to give examples of when they have used an identified skill. The candidate may need to be asked to describe who was there, what was happening, what led up to it, what happened next.

Include only questions that clearly relate to the role. Legally, employers must be able to prove that selection decisions were based on factors relevant to the position.

Interviews

Prior to the interview ensure all candidates have been provided with details of the interview including when, where and how the interview will be conducted and if they need to bring anything with them. For some groups it is common practice to invite candidates to bring their whanau or support person(s) to the interview.

Select a member of the panel to act as 'host', welcoming the applicant and informing them of the interview process. Remember to allow time for the applicant to ask questions.

It is important that all panel members are aware of cultural differences and the impact this may have on the behaviour of the applicant e.g. avoiding eye contact with an elder is a sign of respect for a Pacific Islander, while seen as discourteous to a European.

The interview panel should all use the same method of recording for ease of comparison and so that they can support their decisions with factual observation data. Answers from each applicant should be rated by a systematic scoring method.

Questions with a sexist or racist bias or questions on sexuality, religion, marital status or age are not allowed by law and will be grounds for complaint (e.g. asking women if they will be having children will provide grounds for complaint under the Human Rights Act, 1993). The hours and conditions of work can be discussed and a relevant question can be asked such as "How will this fit in with your life"?. This doesn't ask for specific information about their home life but may highlight potential issues e.g. rotating shifts may clash with childcare arrangements or lack of private transport may make getting to an early shift on time difficult.

At the end of the interview, advise the applicant when the decision is expected to be made and how they will be informed of the decision.

As part of the planning process, allow enough time for each interview (minimum one hour), and 15 minutes between interviews for a panel discussion.

Template: Interview matrix

3.7 Making selection decisions

Be firm about using the critical factors and avoid being swayed by personality in an interview. While personality is important, the critical factors are more important at this point in the process. Clarity is very important. Candidates will be either a 'yes', a 'no', or a 'maybe'. If one person is clearly a 'yes' to all panel members there is no need to discuss the 'maybes'.

If the best candidate did not demonstrate ability in all the critical skills, consider re-advertising, training the candidate or lowering the requirements, taking into account the time and cost of each option.

Reference checks

Following the interview, conduct reference checks to confirm information gathered on the applicant, follow up on any issues that are still outstanding or to clarify the candidates ability to perform certain tasks. Consider using the question 'would you re-hire this person'? Do not rely solely on written references as verbal references allow specific questioning in relation to the role requirements.

Template: Referee checklist

Post selection

Offer the role to the successful candidate but do not inform other applicants until the successful candidate has accepted and signed the contract. Once the contract is signed send them relevant employment information or arrange a suitable time to meet prior to commencing work.

Promptly contact unsuccessful applicants and thank them for their application and participation in the process. Phoning is preferable. Unsuccessful applicants may be ideal to fill future vacancies so maintain a positive relationship with them. It is also good practice to provide feedback to individuals on their skills and experience and a positive comment from the interview.

Disclaimer

The information included in the following pages has been sourced from the Department of Labour booklets and website. It provides an overview of some of the issues relating to hiring new employees, establishing employment agreements, negotiating and problem solving.

The authors, contributors and publisher disclaim liability to any person in respect of any action taken or omitted, or the consequences of any such act or omission, by any person relying on the information included in this chapter.

Readers are recommended to seek independent professional and legal advice for matters relating to employment.

4 Employment Agreements

The Employment Relations Act 2000 has “good faith” as its central principle. Employers, employees and unions must engage with each other honestly and openly, in the spirit of the Code of Good Faith. Key principles of the Act:

- Promotes good employment relations
- Sets the environment for employment relationships
- Sets out requirements for the negotiation and content of employment agreements
- Provides prompt and flexible options for resolving employment problems.

Employment agreements under the Employment Relations Act (ERA) may be one of three types:

- Collective agreement with union members
- Collective agreement with non-union members
- Individual agreement (which may or may not be a fixed-term employment agreement).

In recreation, sport or leisure facilities it is likely that both collective and individual employment agreements are in place. When new employees are hired, consideration needs to be given to whether the employment is covered by existing collective employment agreements, or an individual employment agreement.

All staff, including part-time and casual staff, must have employment agreements that provide the same conditions as those for full-time permanent staff. To avoid a claim of unfair bargaining, ensure that employees understand the terms of their contract, have an opportunity to seek independent advice and are not given any undue pressure.

Probationary periods

An employment offer can be made that includes a trial period of up to 90 days. Trial periods must be negotiated in good faith, agreed to in writing and are voluntary. If a probationary period is in the contract, this must be made clear to the employee. Employers have a duty to provide training to the employee during the probationary time and the correct procedures for performance management and role termination (if required) must be followed.

Fixed-term employment agreements

Fixed term agreements must cover the core terms outlined under Individual Employment Agreements plus any other conditions that are agreed by both parties. It must be clearly understood by both parties that the term of employment is for a fixed period and the reasons for this explained to the applicant.

Situations where a fixed term contract would be used are:

- To temporarily replace an existing employee who is absent on long-term leave or parental leave
- The work is for a one-off project
- The work is seasonal.

Refer to a legal advisor, union or a business support organisation e.g. Employers and Manufacturer’s Association or contact the Department of Labour Employment Relations Service for more information on any of the above areas.

5 Induction

New staff members are required to become familiar with new information, systems, customs and relationships in a short period of time. An induction programme will assist the new employee develop the knowledge and skills required to become fully functioning in their role. To ensure the new employee feels welcome, an event such as morning tea or a mihi whakatau could be organised.

Effective induction programmes have set goals to enable the new employee to see the purpose of each activity and to help identify gaps in their initial learning. The programme can be delivered by a mixture of briefings by the manager or colleagues and background reading, as well as buddy systems and role shadowing.

It is important that the new staff member meets other employees, and has opportunities to develop social connections and learn about the informal rules and behaviours of the facility. Assigning the new employee a 'buddy', who will give them appropriate information and guidance, can help this process.

An induction programme should be tailored to cover areas specific to the employee's role. It should be reviewed regularly during the first couple of weeks to ensure it is delivering the information needed, with a formal review at the end of two weeks, and again after four weeks.

After the formal induction process has been completed, the new employee should self-assess against the initial list of topics to identify any areas that require revision or additional depth.

Skills Active have developed induction packages suitable for people who are new to a facility. These are included in the National Certificate in Recreation and Sport, core skills Level 2.

5.1 Induction checklist

Induction information topics can cover a wide variety of subjects, depending on the nature of the facility, but common topics include:

- Organisation vision and goals
- Organisational structure
- Orientation to the office and administration processes, including the computer
- Employment policy and procedures including a signed employment pack
- Facility features, operation and procedures
- Health and safety systems and procedures including emergency evacuation and response
- Information on customers, products and programmes
- Work team information
- Individual work role.

Being introduced to key staff that can provide support and assistance at the commencement of employment can ensure the new employee gets a positive start. If possible provide a "buddy" or pair up a new employee with an experienced staff member.

6 Managing a Team

Managers should always be aiming to develop staff so they are productive, experiencing role satisfaction and engaged. Key actions to achieve this include:

- Provide a planned induction process for new staff
- Ensure work is clearly defined, achievable, and relevant
- Have clear and mutually agreed expectations of performance and standards
- Provide staff with an opportunity to participate in decisions which affect their own work
- Give feedback and recognition of performance
- Provide opportunities for training and development
- Ensure the workplace is well resourced, suitable for work, enhances work and the employee's work experience and quality of work life, and conditions of employment are considerate and equitable
- Ensure information and communication systems are open and accessible to all
- Help staff have a sense of belonging to the facility and commitment to the facility's purpose.

Managing a team successfully requires a number of skills including delegating, motivating, communicating and developing staff.

6.1 Delegation

Delegation is a core skill for any manager. To be able to delegate work successfully, the team needs to understand the vision of the facility, the part they play in this and how their role contributes to the overall vision.

Good processes are also required for allocating the right tasks to the right people in the right way. To allocate tasks it is important to:

- Clearly understand the task and the skills and abilities required to complete it
- Know the team members, their skills and personalities, so that they can be appropriately matched to the tasks
- Ensure staff members have ownership of tasks, focusing on the results, not the details of how it is to be carried out
- Clearly articulate tasks and desired results and set clear targets and goals
- Support staff to undertake the task. Ensure they are appropriately resourced, be available for coaching, establish timelines and checkpoints
- Monitor and review the work
- Recognise and reward good work.

6.2 Team meetings

A key method of communicating with the whole team is through team meetings. Actions for ensuring meetings are task focused include:

Prior to meeting

- Distribute an agenda, and include the date, time and place, plus any background reading or information
- Prepare information and ensure participants have something to prepare or contribute.

During meeting

- Follow a standard process and familiarise new staff with that process
- Keep discussions to the topic
- Keep a record of the meeting
- Set up a time for the next meeting (time, date and venue).

After meeting

- Follow-up from meeting including distributing notes and other relevant information, further action, etc.

6.3 Motivation

What motivates people in the work place varies from person to person. Staff generally perform better when they are self-motivated and managers can contribute to the self-motivation of their staff by setting realistic expectations, monitoring performance and providing feedback.

The following questions can be used for developing self-motivation in staff. The aim is to initiate purposeful, role-related discussion. Feedback on specific, objective, observable behaviour, rather than judgemental praise or criticism will have a more positive effect.

Promoting self motivation

Subject	Questions
Questions that develop self-motivation	<p>“What is your goal? How will you know when you have reached it?”</p> <p>“What part of your work do you feel most pleased about?”</p> <p>“Looking back, what would you have liked to do better or differently?”</p>
Feedback as an objective observer - give an accurate behaviour description followed by a personal response to that behaviour	<p>“You managed to get that report in by the deadline. It’s a relief to still be on target, I appreciate you put in some long hours for this.”</p>
Seek a more general interaction related to work	<p>“How’s your work going?”</p> <p>“Which of your achievements do you feel most pleased about?”</p> <p>“Where do you see a need to improve or change what you’ve been doing?”</p>
Help the staff member look at what they do in the facility	<p>“How do you see the connection between what you do and the goals of the facility?”</p> <p>“What encouragement or recognition would you like from the other staff?”</p> <p>“Tell me if you have ideas about what could be done by the facility to make things work better”</p> <p>“What helps you in your work? What hinders you?”</p>
Encourage staff to develop together professionally	<p>Have work groups meet briefly and discuss their work using the ideas above.</p>
In a problem solving mode, seek information	<p>“Tell me what you really enjoy about your role.”</p> <p>“Tell me what annoys or frustrates you about your role.”</p> <p>“What ideas do you have to change things for the better?”</p>

6.4 Team building

As a manager, an important part of the role in motivating the team and ensuring productivity is team building. A useful way to think about the team is by using Tuckman's Teamwork Theory¹ which identifies four key stages in team evolution: forming, storming, norming and performing (others have been added since such as adjourning). Diagram one shows the relationships between these stages and staff morale.

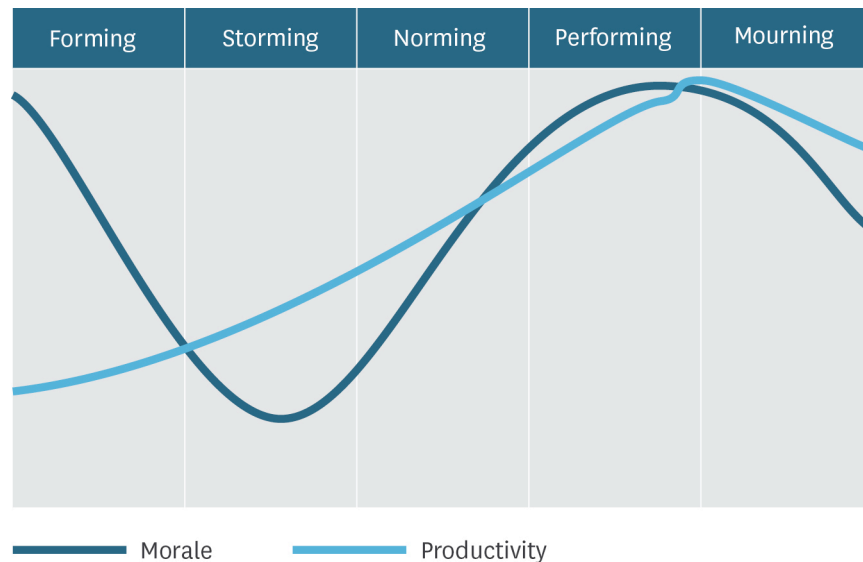


Diagram one: Tuckman's Team Theory²

Forming: is the phase where the team has not yet bonded, team members are still finding their place and understanding the work of the team. The manager plays a dominant role, as expectations of roles, responsibilities and expected results are set.

Storming: is the phase where group members begin to see themselves as part of a team. It can also be a time of challenge towards each other, the team leader, and the team purpose. At this stage, conflict and confrontation are common, and this is likely to have an impact on performance.

The manager's role is to establish processes and structures, build trust and relationships between people, resolve conflict swiftly and remain positive.

Norming: is the phase where the team members begin to work together to develop processes, clarify roles and build 'togetherness'. As a manager, this is a good time to step back and coach team members to progress their goals. It is also a good time to arrange a team-building event.

Performing: is the phase of 'synergy' where the team is focused on their tasks as well as their relationships and are able to deliver high performance through working effectively together. As a manager, this is the time to have a 'light touch' and begin focusing on other goals or areas of work.

¹ Adapted from: *Forming, Storming, Norming and Performing – understanding the stages of team formation*, Mind tools : http://www.mindtools.com/pages/article/newLDR_86.htm and *Teamwork Theory*, The Happy Manager: <http://www.the-happy-manager.com/articles/teamwork-theory/>

² Model adapted from Skills Active, 2012, *First Line Management – Team building processes Training Resource* pg 24

This is a model, and not all teams will move smoothly through these stages. In some cases stages will be repeated as the environment or team changes. Recognising these stages, working with the team and moving the team onto the next stage is a key role of managers.

Transitioning through each stage

Forming

- *Provide strong direction*
- *Establish clear individual objectives*
- *Establish clear team objectives*
- *Make team activities enjoyable*
- *Provide maximum support*



Storming

- *Establish processes and structure*
- *Resolve conflicts quickly*
- *Build trust and positive relationships*
- *Provide assertiveness training*
- *Give high level of support*



Norming

- *Develop decision making strategies*
- *Encourage sharing of strengths*
- *Celebrate success*
- *Give moderate level support*



Performing

- *Delegate*
- *Clarify objectives*
- *Consider enhanced inputs from team*
- *Give minimal support*

7 Managing Staff Performance

Managing staff performance is a core task of managers, and there are a series of tools to help with this process.

7.1 Setting performance objectives and targets

The purpose of this process is to set individual staff performance objectives covering a stated period of time that could range from the next hour to the next year. The process allows for some flexibility and creativity among staff as they establish how they will achieve the expected results. The performance objectives must relate to the business or strategic plan and link to their role description.

It is important that staff have ownership of the targets and to achieve this they must be involved in the process of setting the objectives and targets. This is a contract - an agreement concerning work that will be done. Clear procedures must be in place should the staff member identify a need to deviate from the agreement.

Performance objectives should start with a verb, be SMART (specific, measurable, achievable, realistic, time-bound), be within the individual staff member's control and should specify resource constraints. They should be written clearly, be mutually agreeable to both manager and staff member and appended to an employment contract to form part of the contract.

Some people prefer to work with targets and to monitor performance in relation to achievement or non-achievement of work targets. The choice is up to managers.

Examples of performance objectives

- Monitor implementation of business plan and prepare quarterly reviews of achievement against plan for presentation at each executive meeting
- Prepare financial reports showing cash flows, actual YTD, budget, statement of income and expenditure on a two-month basis for presentation at each executive meeting
- Plan and implement four facility open days by 31 December 2004.

Example of detailed targets for monitoring performance

To provide quality and responsive service to members:

- Reception is always staffed during opening hours
- Written complaints from customers are responded to within three working days
- Financial reports are circulated within a week of the end of the month
- Customer opinion on what they need from the facility is canvassed every six months and the information developed into recommendations for the management team to consider.

The common feature of the two different models is measurement.

7.2 Reviewing performance

When developing performance objectives, it is important to identify the mechanisms that will be put in place to monitor and measure targets and performance objectives. This ensures that everyone is aware of their responsibility and accountability and that review of progress is an expected part of the role.

Reviewing and monitoring performance should be an ongoing process, not an annual event. Referring to targets in the business plan and obtaining updates on progress keeps the performance agreement vital, relevant and useful. The review also ensures objectives and targets are still relevant. Arrange quarterly reviews and an annual review which will include planning for the following year. Performance reviews can help identify training and development needs and provides an opportunity for formal feedback and discussion.

To be effective both the manager and the staff member need to prepare for the review and there must be clear, specific, measurable performance objectives. Avoid inconsistent standards, confusing performance and motivation and judgement and bias corrupting the process.

It is also important to record the results of the review and ensure both parties agree to the record.

Performance review format

The performance review meeting should be a discussion where the staff member does most of the talking and the manager remains open, interested, and encouraging about the staff member's self-assessment of their performance. The manager's role is to provide feedback on specific areas at the request of the staff member.

Performance reviews should:

- Report progress against objectives
- Identify areas of achievement, underachievement and potential improvement
- Explore reasons why objectives were not achieved
- Develop strategies for achieving objectives
- Identify other performance related issues
- Review training needs.

Template: Performance appraisal

7.3 Feedback

A skill of good managers is providing feedback that is objective, constructive, specific and clear. Giving feedback should happen in response to the completion of tasks throughout the year, as well as at performance review meetings.

Feedback can occur at regular staff meetings, in informal settings and as part of debriefing from particular projects. When giving feedback, consider the setting, especially if provided in a group. Feedback should always be positive and constructive.

Constructive feedback has two elements:

- Presentation of factual descriptions of behaviour
- Presentation of opinion, personal response, suggestions for training, other interventions or questions inviting a response from the staff member.

Remember to:

- Give the facts: "I noticed you provided an informative report to accompany the budget."
- Give opinion/personal response: "I found this useful, especially in understanding the additional expenditure last month."
- Invite a response: "What is your perspective on providing this report?"

7.4 Mentoring staff

Effective mentoring consists of a combination of task-focused (i.e. challenging or stretching) and supporting (i.e. nurturing) behaviours. Mentoring should not be confused with coaching, which focuses on developing skills and performance, and where the agenda is set by the coach.

Key aspects to the mentoring process are:

- The agenda is set by the learner
- The focus is on capability and potential
- It is concerned with implications beyond the task
- Feedback and reflection is by the learner.

The benefits of establishing mentoring relationships are many, and include:

- Improved staff retention (less likelihood of losing staff within the first six-month period)
- Improved motivation
- Leadership development
- Improved communication.

7.5 Peer mentoring – person focused

Peer mentoring is a process for pairing up someone who is new to an experience with someone who has already been exposed to the experience. Staff can be from either within the facility, or from a different organisation but in similar roles. It is an opportunity to grow the skills of both participants and build their reflective practice.

Peer mentoring is a tool which enhances the ability to:

- Share challenges and difficult incidents
- Share and learn from successes
- Develop resources for future situations
- Explore professional issues
- Support each other in work
- Reflect on work performance and learn from experiences
- Give and receive feedback.

Key steps to developing a peer mentoring programme include:³

- Mentor selection and training
- Mentee selection
- Matching mentor and mentee
- Mentor / Mentee agreement
- Mentoring duration
- Review and evaluation.

7.6 Managing performance or misconduct issues

When staff are not performing to the agreed expectations of management, it is important to act quickly before any issues escalate. Seek advice from employment relation specialists or an HR Advisor before any action is taken to ensure correct procedures are followed according to employment legislation.

Clear processes and procedures must be in place if mediation or conflict resolution is required. In some cases of serious misconduct, disciplinary actions can be implemented but only after an investigation into the event has been carried out.

Key steps required when dealing with performance management concerns are:

- Reminders and discussion surrounding expectation
- Support through counselling and up-skilling
- Verbal warnings
- Written warnings
- Termination.

All practicable steps to turn unsatisfactory performance around should be undertaken.

7.7 Employee Assistance Programmes

Employee Assistance Programmes (EAPs) are a useful way to help employees deal with personal problems that might adversely impact their role performance, health, and well-being. They generally include short-term counselling and referral services for employees and members of their household.

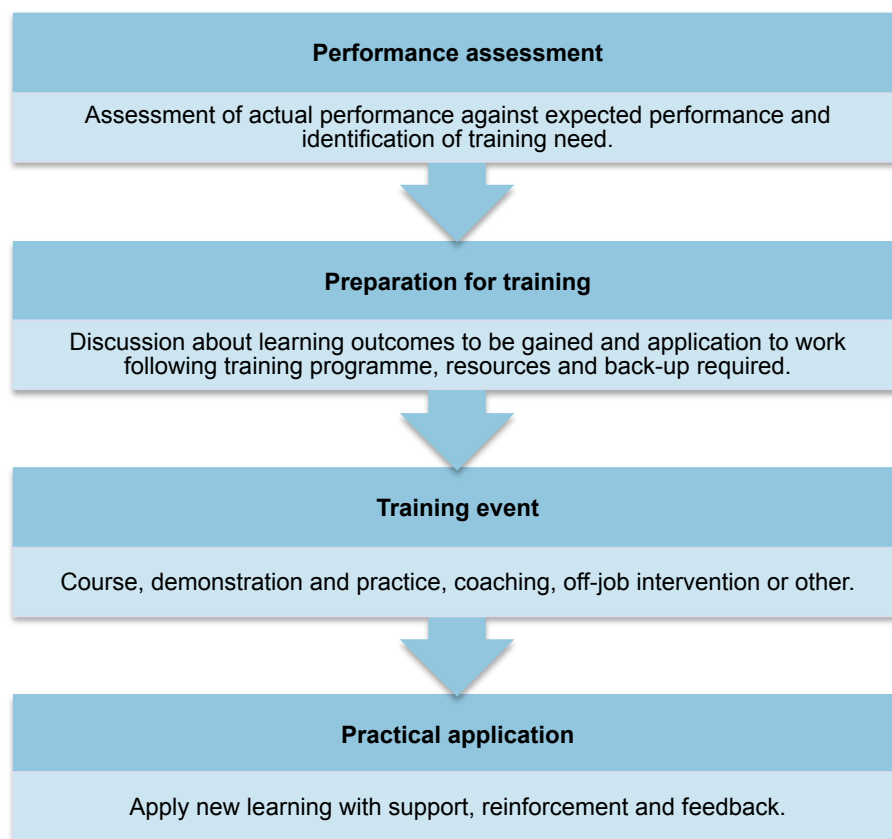
³ Adapted from *A guide to setting up a Peer Mentoring Programme*, NESTA:
http://www.nesta.org.uk/sites/default/files/peer_mentoring_programme.pdf

8 Learning and Development

Training needs must relate clearly and directly to the work of the facility. Consider the cost and benefit of training compared to the cost of not providing training. Is the need sufficient to justify the expenditure.

Clear role descriptions, role analyses, and performance objectives that relate to the business plan are useful tools for identifying training needs. These can be used as assessment tools, to ensure that a training need is related to work.

Training is a process that helps develop individual staff member's actual performance so that performance will meet expectations. It can also be provided to prepare a staff member for new responsibilities and assist with succession planning.



8.1 The training sequence

Non-performance does not necessarily mean training is required. Sometimes management intervention is needed. For example, when previous performance is followed by non-performance, training is not required. Find out why they are no longer performing – there could be a range of alternative reasons. Training is sometimes used to avoid confronting staff problems.

Remember to consider alternatives to formal courses to meet a training need. The outcome of the training should match the specific training needs of a staff member, and the training method should match the actual work activity as closely as possible. Options can include one-on-one coaching, buddying system, self-paced learning packages as well as traditional courses.

8.2 Preparing for a training event

Sometimes staff don't get the most out of their learning experience because they're not sure why they're attending, they're not clear on the content or the objectives of the training, or they are unprepared or are unsure of what they want to get out of the learning. To maximise the benefit of the training it is important to ensure the staff member attending the training:

- Has agreed objectives for the learning
- Knows why they are attending the event and is happy to attend
- Understands what will be covered, and the key outcomes of the event
- Has completed any pre-training work.

If a member of staff is undertaking a significant learning commitment (e.g. academic study, substantial course) ensure a learning contract has been agreed to.

8.3 Post training

Providing an opportunity to put the new skills and knowledge into practice is essential. Applying new information and skills is easier when it is still 'fresh' and staff can feel demotivated if they don't have the chance to apply their newly gained knowledge.

It is good practice for managers to meet with staff post training to:

- Discuss whether the objectives were achieved
- Explore what was learned, and any action plan they may have developed
- Help them to find ways of using their skills and knowledge in the next couple of weeks
- Encourage them to share what they have learned with other team members.

8.4 Developing career pathways

While staff are employed to do their current role well, finding out about and supporting their future aspirations can be beneficial. Staff who feel supported to develop their skills and improve their performance will feel more committed to the organisation, and perform better.

The process of developing career pathways is similar to any forward planning but will enable staff to explore their own interests and shape their personal goals. Where it is possible, dovetail work opportunities with career goals. This will potentially extend staff and deliver positive outcomes for the facility.

When career planning it is useful to prepare two career goal statements: one for the short term (next six months), and the other for the longer term (to be achieved within three years). This goal should integrate personal values, preferences, strengths and attitudes and be matched to the career pathway.

Template: Career planning template

Further information

www.careers.govt.nz

8.5 Professional associations and networks

Engaging with professional associations and professional networks can provide an excellent opportunity for staff development and facility networking. Professional associations in the sector include:

- Entertainment Venues Association of NZ <http://www.evanz.co.nz/>
- Exercise Association of NZ <http://exercsenz.org.nz/>
- Facilities Management Association of NZ <http://www.fmanz.org/>
- Sport NZ <http://www.sportnz.org.nz>
- New Zealand Asset Management Support <http://www.nams.org.nz/>
- New Zealand Institute of Management <http://nzim.co.nz>
- New Zealand Association for Training and Development <http://www.nzatd.org.nz/>
- New Zealand Recreation Association <http://www.nzrecreation.org.nz/>
- Swim NZ <http://www.swimming.org.nz/>
- Water Safety Council NZ <http://www.watersafety.org.nz>

9 Volunteers

Volunteers may be involved in the facility in a number of ways e.g. on Advisory Groups, on the Board, or as part of a user group. There may also be volunteers working alongside staff in the facility or on specific programmes. Management obligations to volunteers are very similar to the obligations to staff and they are protected under the Health and Safety in Employment Act.

Volunteers are different from paid staff and make a valuable contribution to the facility including:

- Their relationships with people are usually more relaxed and informal than those of paid workers. They can devote a great deal of time to one particular person or to a single piece of work
- They are less affected than full time staff by the pressures and strains of the facility in which they are working
- They can bring in 'outside' views and give independent judgments
- They may provide a different approach and a range of different skills.

So that both the facility and the volunteers benefit, remember to:

- Provide opportunities for volunteers to participate in significant activities or projects and clarify roles and responsibilities
- Match a volunteer's interests, needs and skills with a specific task or role
- Provide good training and support including performance appraisals that provide an opportunity to give feedback
- Create opportunities for volunteers to celebrate successes
- Encourage volunteers to be involved in decision making with other staff.

10 FAQs

Q: Our facility doesn't have a lot of formal written procedures and HR policies. We just rely on people to be honest and that usually works for us. If it is not broken, why fix it?

A: Written procedures and policies are both best management practice and in some cases legally required e.g. dealing with disputes. They also help to set expectations and standards of behaviour with staff, and this in turn will enhance their contribution to the business and increase their productivity and motivation. It also enables you to be a fair and equitable employer. To help you in this process, there are many examples of templates that you can adapt for your own facility either in the templates section of this manual or other resources.

Q: Performance is slipping right now, but we're under a lot of stress with [name]. Should I cut the staff some slack until things are a bit more settled?

A: Poor performance, whatever the circumstances, should always be addressed immediately, before it escalates. Work together with your staff to identify what the causes are and identify actions to mitigate the issues. Remember to follow up and keep following up on actions and reviewing their effectiveness.

11 Templates

- 11.1 Operations Manger role description
- 11.2 Recreation Centre Assistant goal and responsibilities
- 11.3 Recruitment phases
- 11.4 Shortlisting matrix
- 11.5 Interview assessment matrix template
- 11.6 Referee checklist template
- 11.7 Performance appraisal template
- 11.8 Career planning template

11.1 Operations Manager Role Description

Person description

The person suitable for this position will be able to direct the facility operations in accordance with the business plan. They will require skills and knowledge to:

- Co-ordinate and supervise the work of others in line with established goals and objectives
- Positively manage relationships with customers, tenants, contractors, neighbours
- Confidently manage projects, plans and processes
- Effectively problem solve
- Effectively manage risk, resources, budgets, business plans, contracts and assets.

Key responsibilities

The Operations Manager is responsible for managing the day-to-day operations of the facility to a high standard. Specific responsibilities of the Operations Manager include:

Health and Safety

- Ensure a healthy and safe work environment for employees and others affected by facility activities.

Facility and Asset Management

- Develop and set the policies, standards, procedures and guidelines for facility operations and ensure these are carried out (e.g. cleaning, maintenance, pack outs)
- Ensure that all legal and industry standards for facility operation are adhered to including building maintenance
- Ensure facility contracts are managed effectively
- Ensure all operational activities comply with organisational standards including health and safety.

Customer Experience

- Ensure customer focused delivery of facilities and services
- Develop and maintain positive relationships with facility customers and user groups.

Leadership

- Lead and motivate the facility operational team including performance management, recruitment and training
- Develop and maintain efficient and effective duty rosters, daily work schedules and facility procedures for operational staff.

Relationship Management

- Develop and manage relationships with customers, particularly key user groups and stakeholders, tenants and staff to ensure appropriate service delivery and maintenance
- Liaise with contractors and suppliers to ensure high standard of service delivery.

Business and Financial Management

- Develop and implement business and work plans, equipment and asset maintenance plans, budgets
- Identify capital expenditure requirements
- Monitoring and reporting
- Prepare monthly KPI reports.
- Implement strategies to maximise utilisation of the facility.

The Organisation's mission is to be the best recreation facility in New Zealand, servicing the local, regional and national communities. The ideal person for the position would have:

- Interest and experience in recreation and facility management
- Experience in leading teams
- Relationship management skills.

Appraisal and Review

At the commencement of the contract, key result areas will be identified and performance goals negotiated. These will be monitored on a two-monthly basis, with six monthly reviews of overall performance.

Training

Training needs appropriate to the in-coming Operations Manager will be identified and an appropriate training programme will be developed. Changes to the training programme can be made as part of the six monthly reviews.

Terms and Conditions

The terms and conditions will be negotiated with the successful appointee. This is a full-time position.

Adapted from: Operations Manager Role Description, ASB Sports Centre, Wellington City Council.

11.2 Recreation Centre Assistant Goals and Responsibilities

Responsible to: Recreation Centre Manager

Goals are to:

- Assist with the smooth and harmonious operation of the facility
- Contribute to the overall operation of the facility in an efficient and cost effective manner
- Maintain high standards of operation in accordance with the facility policies and procedures
- Provide quality service to clients and potential clients at all times to achieve excellence in customer satisfaction
- Contribute fully to the achievement of the social and financial goals of the facility
- Present a professional image at all times.

Specific responsibilities

- Handle counter and telephone enquiries relating to the facility and its activities. This requires a full understanding and awareness of all programmes, services and facilities
- Process the receipting of fees payable for the use of the facility
- Keep records for the facility as directed
- Rectify and or notify the facility manager of unsafe equipment, facilities, or customer complaints
- Ensure the reception area is secured at all times
- Ensure that the complex is clean and tidy
- Actively instruct in programmes
- Set-up and pack-out equipment as required
- Ensure the equipment and facilities are maintained in a clean safe condition and implement the necessary procedures as required
- Ensure all users of the facility observe all facility rules at all times
- Undertake cleaning duties as required.

Adapted from: Recreation Assistant Role Description, ASB Sports Centre, Wellington City Council

11.3 Recruitment phases

Timeframe	Actions	Who	✓
Week one	<ul style="list-style-type: none"> • Person specification completed using position description • Prepare advertisements and promotion and obtain necessary approvals • Application information prepared • Enquiries contact person identified • Advertisements placed in appropriate media 		
Week two	<ul style="list-style-type: none"> • Enquiries received and application information sent out, emailed or downloaded • Interviewers meet or teleconference • Shortlisting criteria developed • Interview questions developed based on person specifications 		
Week three	<ul style="list-style-type: none"> • Applications returned by deadline • Interviewers to review applications and create interview shortlist • Candidates contacted for first interview 		
Week four	<ul style="list-style-type: none"> • Interviews conducted • Shortlist applicants for second interview if required and candidates contacted • Interview two conducted • Referee and police checks conducted 		
Week five	<ul style="list-style-type: none"> • Successful candidate contacted • Official 'offer of employment' letter sent • Signed 'offer of employment' letter returned • Unsuccessful candidates contacted 		
Week six – ten	<ul style="list-style-type: none"> • First day of employment! 		

11.4 Shortlisting matrix

Name			
Skill 1 <i>0 - 3</i>			
Skill 2 <i>0 - 3</i>			
Skill 3 <i>0 - 3</i>			
Qualifications <i>0 - 3</i>			
Experience <i>0 - 3</i>			
Total			
Comments			
Rank			

11.5 Interview assessment matrix

Candidate:	
Position:	
Interviewers:	
Date:	

Rate the candidate on the following criteria as per the person specification of the position.

- Key:
- | | | |
|---|---|--|
| 1 | = | response did not answer the question |
| 2 | = | there is some merit to the response |
| 3 | = | good response but more detail would improve it |
| 4 | = | perfect response exactly what we are expecting |

Criteria (insert the questions to be used)	Tick appropriate box				Comments (directly related to the questions)
	1	2	3	4	
1.					
2.					
3.					
4.					
5.					
6.					
7.					
Total					

How well is this person suited to the position (general comments/observations)?

.....

Hiring decision

Yes No Undecided

Note: This form should be retained and filed for 12 months after the interview has occurred to ensure that unsuccessful candidates do not allege unlawful discrimination in failing to shortlist or appoint them, and that there is ample evidence to support their lack of success in gaining the position.

SOURCE: YMCA New Zealand

11.6 Referee checklist

Referee checklist		✓
Prior to calling ensure you have:	<ul style="list-style-type: none"> • Sought the candidate's permission to do so • Candidate's CV to hand • Complete privacy • Note taking equipment. 	
Initial contact with the referee:	<ul style="list-style-type: none"> • Introduce yourself and purpose of call • Advise length of call and check they have time • Briefly describe the role for which you are recruiting. 	
Sample questions to ask:	<ul style="list-style-type: none"> • How long did x work for your organisation (to confirm dates on CV) • How long did x work for you • What was his/her role title(s) • Could you briefly outline his/her key role and responsibilities • How would you describe his/her performance in the role • What were his/her strengths • What are his/her areas for further development • What was your working relationship like as his/her manager • How did he/she relate to the wider group of employees • How did he/she relate to customers/clients • How would you describe his/her levels of motivation in the workforce • What is he/she motivated by • What was (are) his/her reasons for leaving the organisation • Given the chance would you re-employ the candidate in the future • Is there anything else you would like to say in support (or otherwise) of this candidate? • Thank them for their time. 	

Adapted from: *People Management, Sport NZ*,
<http://www.sportnz.org.nz/assets/Uploads/attachments/managing-sport/strong-organisations/People-Management-Toolkit.pdf>

11.7 Performance appraisal

The following is an example of a performance appraisal for a Recreation Assistant based on the previous role description. This is not an inclusive list.

Performance objectives	Staff member's comments	Manager's comments	Action
<i>Positive management of customer enquiries including registration and fee processing</i>			
<i>Proactive management of hazards</i>			
<i>Actively maintain cleanliness and tidiness of the centre</i>			
<i>Professional programme instruction and management</i>			
<i>Effective equipment management</i>			
<i>Actively innovative</i>			

11.8 Career planning

Staff can use the following matrix to help them develop career plans:

Goal statements	Actions	Date
<p><i>Check:</i></p> <ul style="list-style-type: none"> • <i>It is positively stated</i> • <i>Important enough for me to work on</i> • <i>Do I have the time and energy?</i> 	<ul style="list-style-type: none"> • <i>What more do I need to know or learn to do?</i> • <i>What risks do I need to take?</i> • <i>From whom do I need support? What kind of support?</i> 	

12 Questions for Educational Context

Staff recruitment

List and provide a brief description of the main tasks in the recruitment and selection process for new staff.

Employment agreements

Why do you think we should have employment agreements? Describe how an employment agreement can work to protect the interests of both parties to the agreement.

Staff management and training

Employing the right staff is just a start. Describe how the following can contribute to overall staff satisfaction and an increased likelihood of retaining good staff.

- Good day-to-day management processes
- Training opportunities
- Performance reviews and formal feedback.

Peer mentoring offers some unique opportunities for staff development, personal growth and relationship building. Discuss this statement in relation to staff in a sport and recreation facility.

List the key elements in developing staff training and briefly describe what is involved in each stage.

13 References and Further Information

13.1 Further information

Clutterbuck, D. (2001). *Everyone Needs a Mentor: Fostering talent at work*

Employers and Manufacturers Association – Employer guides and workshops accessed from <https://www.ema.co.nz>

Ministry of Business, Innovation and Employment - Relationship service guides, fact sheets, statues accessed from <http://www.dol.govt.nz>

New Zealand Legislation accessed from <http://legislation.govt.nz>

Careers New Zealand accessed from <http://www.careers.govt.nz>

Skills Active, On-the-role training and qualifications accessed from <http://www.skillsactive.org.nz/>

Sport NZ, Club Kit – Starting and managing a sport or recreation club, accessed from <http://www.sportnz.org.nz/managing-sport/search?c=18>

13.2 References

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YMCA New Zealand

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