

Strategic Restructuring Plan “The Road Ahead”



Prepared by:

Working Group - comprised of:

Consultants (Hugh Maynard, Nadia Geukjian)

Cornella Maurice, Executive Director

Kimberly Buffitt, Director of Engagement & Development

Roderick Fequet, Human Resources and Community Liaison Officer

Shannon Keats, Executive Assistant

Priscilla Griffin, Office Manager

Feedback: All employees

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1. Executive Summary

The Coasters Association is a non-profit organization with a mission to develop knowledge of the needs and respond to the expectations of the sixteen (16) communities on the Lower North Shore. Additionally, to act in partnership with community leaders, organizations and stakeholders to design and deliver community strategies, programs and services which respond to the region's development challenges and which profile the unique cultural and natural resources of the region.

In the last decade, the Coasters Association has grown in size as an organization, increasing from 6-8 to 20 full-time employees, with at least as many part-time and temporary/seasonal and project employees. In line with the increase in the number of full-time employees, the organization has undertaken a larger and more diversified workload, especially in the area of social service delivery and economic development.

However, over this period, the Coasters Association's human and operational resources have remained the same. In this context, the Coasters Association reviewed its structure and operations in order to improve organizational effectiveness. The main outcomes of the process are:

The restructuring of the Coasters Association into a parent organization with two divisions: the Northern Research Centers and Wellness Centers.

The new structure is accompanied by an operational framework to organize the key functions of the organization on a shared basis between the parent organization and the two divisions:

- Organizational Structure and Management
- Human Resource Management
- Financial Management
- Procurement and Facility Management
- Project Management
- Communication Management
- Risk Management
- Stakeholder Engagement

In line with the new operational framework, the organization's policies and procedures are being reviewed and renewed along with the addition of new ones for elements that did not previously exist. A pay equity assessment will also be undertaken to normalize salaries and benefits.

Lastly, board and staff training needs have been identified, assessed and a plan prepared based on a training needs hierarchy for group training (all staff), small group training (within a division or a team), individual training (work-related skills) and professional development (outside of work hours with financial support).

2. Message from the President of the Board of Directors

This is an exciting time for the Coasters Association as we examine our current processes and outcomes and lay the groundwork for facilitating innovative initiatives and mobilizing community support – now is the time for that change to be executed. I am confident that this will be an energetic period of renewal for the Coasters Association and the beginning of an exciting development chapter for the Lower North Shore.

I can say from personal experience that volunteering with the Coasters Association is incredibly rewarding and an absolute privilege. I can also say that it's a big commitment and a huge responsibility to our Board and staff, but we are dedicated to building a strong organization that has the capacity to grow while supporting the communities with their social and economic development.

I feel strongly that with the support of our board, staff, partners and communities, we will build a stronger organization through our restructuring process. This will allow us to face any challenges that confront us and, understanding that commitment is always required, anything is possible.

All the best,

Eileen Schofield

President – Coasters Association Board of Directors

3. Word from the Executive Director

The vision for the Coasters Association organization started with a steering committee made up of a group of concerned citizens of the Lower North Shore in 1988. With a modest budget of \$10,000, to bring all members of the steering committee in one location (St, Augustine) to discuss the possibility of setting up a non-profit organization. In 1989, additional funds were received to hold a meeting, and hire a Coordinator (myself) to set-up the organization. The association itself was incorporated at a founding meeting that was carried out over a weekend in La Tabatière in February of 1991. The partners landed on a stormy Friday, but the weekend was beautiful. There were so many people in attendance from across the Coast that some had to stand outside the building on Friday night because there wasn't enough room in the hall. The founders and the population had a clear objective of protecting and furthering the interests of the population and contributing to the vitality of the Lower North Shore of Québec.

To say we have grown as an organization over the last 33 years is an understatement. The Coasters Association has gone from one office to having offices in every community and our budget has grown to \$1.35 million in the last fiscal year. As a result of this growth, the Coasters Association has prepared, with the assistance of Services Québec, a plan for restructuring to manage the future growth and development of the organization.

Through our restructuring we want to assure everyone that we are still committed to the vision we started with in 1991. Which is to support the Lower North Shore as an active, thriving region that values the wellbeing of its people. We seek to promote healthy choices for all residents through open communication, collaborative relationships and affordable resources. We are dedicated to building partnerships and coalitions to improve overall community wellbeing without stigma or judgment. We support and connect all groups, organizations and individuals that are committed to making the Lower North Shore a healthy place to live, work, play and age, gracefully!

We believe pursuing this vision requires a strong organization that has the internal capacity to manage growth and change as we move forward. We are proud to share the Coasters Association Restructuring Plan with the communities, our partners and government and look forward to working with you to continue to grow the Coasters Association so it can better serve the population.

Cornella Maurice
Executive Director

4. Our Restructuring Process

The Coasters Association is a non-profit organization with a mission to develop knowledge of the needs and respond to the expectations of the sixteen communities on the Lower North Shore. The Coasters Association also acts in partnership with community leaders, organizations and stakeholders to design and deliver community strategies, programs and services which respond to the region's development challenges and which profile the unique cultural and natural resources of the region.

In the last decade, the Coasters Association has grown in size as an organization, increasing from 6-8 to 20 full-time employees, with at least as many part-time, temporary seasonal and project employees. In line with the increase in the number of full-time employees, the organization has undertaken a larger and more diversified workload, especially in the area of social service delivery and economic development initiatives.

However, over this period, the Coasters Association's human and operational resources have remained the same.

The organization's managerial and administrative component has been constant at approximately four full-time employees, likewise for operational funding. In this context, the Coasters Association has reviewed the organization's structure and operations in order to improve organizational effectiveness. The review included analyzing relationships between staff, board and partnering organizations, the opportunities and limitations of operational resources, the sharing and transferring of information, and the possibilities to combine services, resources or programs to reduce duplication, improve effectiveness and efficiency, and to increase financial stability. Below is an explanation of the situational analysis that was undertaken.

Situational Analysis

Based on staff surveys, interviews for division teams (see Annex 1 for list of internal committees) and a review of documentation, the following is an overview of the organizational review exercise.

CONTEXT - What is the actual situation

- Increase in level of activity
- Increase in number of staff
- Increase in funding resources (more responsibilities)
- Insufficient operational infrastructure
- Staffing numbers and responsibilities have outgrown the capacity of the existing management and administrative structure
- Funding constraints
 - short-term mandates, imbalance between core and project funding, insufficient financial resources dedicated to the management and administrative component within current funding allocations

GOALS – What are the eventual outcomes as a result of organizational restructuring

- To be able to better serve the community by offering more and/or an expanded continuum of services.

- To be able to increase collaboration & partnerships
 - efficient & effective results, avoid duplication and competition for funding
- Improved long term financial stability

OBJECTIVES – What is the aim as a result of the review exercise

- Examine solutions for the organizational challenges faced by staff and the board
- Provide a basis on which to develop a plan to increase the efficiency of the organization.

ISSUES – Where is change needed

- Need for better management structure – more defined, less hierarchical
- Digitalization of operations
- Improved marketing – website & social media
- Improved communications - internal (flow & regularity) and external (partners & public)
- More staff, increased salary compensation, improved teamwork, increased collaboration between staff & board, increase in office space
- The establishment of a human resource department to manage staff of the Coasters Association and its two divisions.
- Training, mentorship & succession planning
- Improved engagement of western communities, and partners

The outcome of the organizational restructuring exercise is contained in this report, accompanied by organizational documentation, processes, and training needs. A list of meetings and reference documents used in the restructuring process can be found in Annex 2.

5. Recommended Restructuring Categories and Steps

Restructuring Process and Development Plan

The first step in the restructuring exercise of the Coasters Association is to establish a structure for the organization accompanied by an operational plan.

Given the evolution of the organization’s activities, it was decided to create a structure with three main components: a parent organization and two divisions. Each component will be staffed by several teams that will group employees into common areas of work (see Annex 3 for organigram).

Parent organization	Coasters Association <ul style="list-style-type: none"> - Board - Community - Representation - Partnerships
Divisions	Northern Research Center(s) <ul style="list-style-type: none"> - Socio-economic development - Business Incubation & Acceleration Program

- Research & Development

Wellness

- Seniors
- Youth
- Family

Operational Plan

The second step is to create an operational framework to organize key functions of the organization, on a shared basis, between the parent organization and the two divisions. The main operational functions are:

- Organizational Structure and Management
- Human Resource Management
- Financial Management
- Procurement and Facility Management
- Project Management
- Communication Management
- Risk Management
- Stakeholder Engagement

Each function is described below and supported with a work plan for implementation. These key functions, as the foundation of organizational success, have also been entered into the Wrike management software, along with staff assignments and timelines, for ongoing monitoring and adjustment.

Policy and Procedures

The third step in the restructuring exercise is to renew and update the policies and procedures of the Coasters Association. This will involve reviewing current policies and procedures and revising and/or adapting them to the operational framework (listed above), as well as creating new ones for the elements that do not currently exist. In addition, a pay equity assessment will be undertaken to normalize salaries and benefits.

Training

The fourth component of the restructuring exercise will be to identify, assess and plan for board and staff training needs. The outcome will be to establish a training needs hierarchy (and associated staff time and costs) as follows:

- Group training (accessible to all staff)
- Small group training (within a division or a team)
- Individual training (i.e., online courses to improve specific skills, i.e. Excel, etc.)
- Professional development (individual training outside of work hours with financial support)

5.1 Organizational Structure and Management

An organizational structure is a framework that allows for the hierarchy within an organization to be defined. This allows for the identification of each position, its function and where and/or who they report to within the organization. This structure is developed to establish how an organization operates and assists an organization in obtaining its goals while allowing for future growth. The structure is illustrated using an organizational chart.

Organizational management involves creating a strategic plan, monitoring its progress and making changes based on results and feedback so the organization can improve its performance. The methods that the organizational leaders of the Coasters Association have chosen to execute organizational management effectively include strategic planning, employee training, communications and stakeholder management as well as robust policies and procedures to achieve its goals of making an impact.

Why is organizational structure and management important?

Strong organizational structure management can help organizations increase operational funds, improve efficiencies and use their material and human resources effectively, while reducing costs and increasing benefits to the communities that the organization works with. The benefits of having an effective organizational management strategy include:

- Establishing a long-term vision for board members and volunteers to engage with
- Setting clear goals for all employees to work toward
- Defining each employee's role and responsibilities within the organization
- Creating processes to achieve organization goals
- Monitoring results, encouraging feedback and making changes as needed
- Finding the best ways to use resources
- Flexibility and adaptability

5.1.1 Work Plan

Restructuring Area	Activities
Organizational Chart	<p>Create Organigrams for</p> <ul style="list-style-type: none"> ● Divisional structure ● Staff organization ● Board committees
Strategic Planning	<p>Conduct Review Process Review the mission statement, values, and five (5) year strategic plan of the Coasters Association</p> <p>Review strategic plans/objectives and goals for the two divisions</p> <p>Analyze Situation Conduct a SWOT Analysis (Strengths,</p>

	<p>Weaknesses, Opportunities, Threats)</p> <p>Complete an environmental scan, or SOAR analysis (Strengths, Opportunities, Aspirations, Results)</p> <p>Create Establish a new five (5) year strategic plan (2023-2028) for the Coasters Association, and strategic orientations for the divisions</p> <p>Create a plan that includes: Short-term, mid-range, and long-term strategies, Goals and objectives, Timelines, Budgets and Responsibilities</p> <p>Connect all planning efforts with ongoing operations</p> <p>Set up mechanisms to measure progress and evaluate strategies that will be implemented</p> <p>Approve Approval of Strategic Plan at AGM</p>
Office Management	<p>Main office Develop policies and procedures for satellite offices</p> <p>Develop staff roles and responsibilities for main office management</p> <p>Implement training sessions with staff on policies and procedures in place</p> <p>Satellite Offices Develop policies and procedures for satellite offices</p> <p>Develop staff roles and responsibilities for satellite office management</p> <p>Implement training sessions with staff on policy and procedures in place</p> <p>Remote Working Develop policies and procedures for remote</p>

	<p>work</p> <p>Develop staff roles and responsibilities for approving remote working</p> <p>Work from home Write policy and procedure for working from home</p> <p>Develop staff roles and responsibilities for working from home</p>
Policy and procedures	<p>Policy Development Review all current policies in place</p> <p>Identify policy needs in all restructuring categories (i.e., organizational structure, human resources, communications, financial management, materials and infrastructures, project management, risk management, stakeholder engagement)</p> <p>Identify who will take the lead and delegate responsibility to a working group, subcommittee or staff members according to the expertise required</p> <p>Gather information (i.e., do we have legal responsibilities in the policy area, existing template or examples, partners that could support different development areas, etc....)</p> <p>Draft all necessary policies</p> <p>Consult with staff and appropriate stakeholders depending on whether the policy is to govern the internal working of the organization or external policy positions</p> <p>Finalize/approve the policy through a four-step process:</p> <ul style="list-style-type: none"> ● Review with internal staff ● Review with Executive Director ● Review with board of directors' policy committee ● Present to board of directors for final approval <p>Procedure Development Identify all areas in the developed policies where there is need for clear guidance on how</p>

	<p>the policy will be implemented (i.e., a policy regarding complaints will require a set of procedures detailing how complaints will be handled)</p> <p>Develop list procedures necessary to implement policies</p> <p>Identify who will take the lead and delegate responsibility to a working group, subcommittee or staff member(s) according to the expertise required to create procedures</p> <p>Draft all necessary procedures Consult with staff and appropriate stakeholders depending on whether the procedure is to govern the internal working of the organization or external policy positions</p> <p>Finalize/approve the policy through a four-step process:</p> <ul style="list-style-type: none"> ● Review with internal staff ● Review with board of directors' policy committee ● Review with Executive Director ● Present to Board of Directors for final approval
<p>Google workspace management</p>	<p>Administration of users:</p> <ul style="list-style-type: none"> ● Three (3) staff persons are given administrative privileges for google workspace ● Set up roles and responsibilities for staff administrators of google workspace ● Develop procedure for changing administrators ● Procedure created for Directors to notify Executive assistant when new staff are hired to set up google workspace <p>Staff training and onboarding:</p> <ul style="list-style-type: none"> ● Training plan on google workspace developed ● Set-up up folder of training videos for onboarding staff ● Develop procedure for the use of google workspace

	<p>Internal and external file management through shared drive:</p> <ul style="list-style-type: none"> ● Carry out research on best practices in shared drives management ● Set-up training on shared drives management ● Have all staff take necessary training ● Develop and share proposed new filing system with Directors ● Make all modifications to current filing system ● Research and implement how to track when files are changed in shared drives ● Create procedure for staff when using shared drive
Board of Directors	<p>Develop a board orientation manual that contains:</p> <p>Staff & Programs - List of all current staff members, including job titles and role descriptions</p> <p>Chart showing the structure of the organization</p> <p>Program descriptions, policies, and procedures</p> <p>Organizational Information -Brief written history, fact sheet, or overview of the organization</p> <p>Articles of incorporation and bylaws</p> <p>List of past board members and their roles</p> <p>Logistics & Policy Information -List of current board members' names, contact information, bios, and roles within the board</p> <p>Board terms of all current board members</p> <p>Rules regarding term limits if any, for board of directors</p> <p>Statement of responsibilities and expectations of board members</p> <p>Board policies (i.e., meeting attendance policy, conflict of interest policy, whistleblower, etc.)</p>

	<p>Operational calendar that's updated annually</p> <p>Financial framework of the organization</p> <p>Develop Organizational & Operational Guidelines for Board of Directors:</p> <p>Policy for recruiting, orienting, informing, and cultivating board members</p> <p>Succession guidelines and policy for unplanned board member exit</p> <p>Expectations and guidelines for board members</p> <p>Process for selecting a board chair</p> <p>Descriptions of different committees, task forces, or subcommittees</p> <p>Create Organizational overview package that contains:</p> <p>Strategic Framework of the Organization</p> <p>Mission and vision statement</p> <p>Strategic plan and roadmap of the organization</p> <p>Detailed action plan including objectives, responsibilities, timelines</p> <p>Ongoing status reports for the organization Meeting Minutes & Reports</p> <p>A year's worth of past board meeting minutes, reports and documentation from past committee meetings</p> <p>Last three (3) years of organizational financial statements</p> <p>Any other reports, metrics, and minutes from the board committees for the organization, including prior annual report, most recent audit report, and current annual budget</p> <p>Marketing Information & Supplemental Information:</p>
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	<ul style="list-style-type: none"> ● Contact information, including the organization’s website, promotional materials such as marketing pages, branding guidelines, and messaging overviews ● Guides for any tools or resources your team is using to manage board output ● Emergency contact info and communication plan <p>Develop onboarding plan for Board of Directors</p> <p>Schedule for board onboarding</p> <p>Roles and responsibilities of staff defined for Board of Directors onboarding</p>
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5.1.2 Outputs from Process

The following documents and systems will be produced as a result of the restructuring process in this development area:

- Three (3) organigrams for division structure, staff and board committees
- Strategic plan 2023-2028
- Office Management Plan
- Policy and operating procedure manual for Coasters Association
- Google workspace management system
- Board of Directors Manual
- Organizational & Operational Guidelines for Board of Directors
- Organizational overview package
- Board of Directors Onboarding Plan

5.2 Human Resource Management

Human resource management (HRM) is the practice of recruiting, hiring, deploying and managing an organization’s employees. HRM is now often replaced by the term human capital management (HCM), but generally is simply known as human resources (HR). An organization’s HR department is usually responsible for creating, putting into effect and overseeing policies governing the staff and the relationship of the organization with its employees.

Coasters Association views HRM as employee management with an emphasis on employees as assets of the organization with employees sometimes referred to as human capital. As with other organizational assets, the goal is to make effective use of employees, reduce risk and maximize the return on investment.

The importance of human resource management (HRM)

The role of HRM practices is to manage the people within a workplace to achieve the organization’s mission and reinforce its operational culture. When done effectively, HR managers can help recruit new

professionals who have the skills necessary to further the organization's goals as well as aid with the training and development of current employees in order to meet the organization's objectives. An organization is only as good as its employees, making HRM a crucial part of maintaining or improving the health of the organization. Additionally, HR managers can monitor the state of the job market to help the organization stay competitive. This could include making sure compensation and benefits are fair, events are planned to keep employees from burning out and job roles are adapted based on the market.

How does HRM work?

As part of the Coasters Association’s restructuring, the human resources management is now carried out by a dedicated HR professional, who is responsible for the day-to-day execution of HR-related functions.

5.2.1 Workplan

Restructuring Areas	Activities
Systems for Human Resources Management	<p>Orientation, Onboarding and Employee Handbooks</p> <ul style="list-style-type: none"> ● Get all working documents regarding employee handbook ● Get all onboarding and orientation documents from departments ● Create folder for all documentation and add to Wrike ● Review all documentation with consultants and finalize documents to present to Executive Director ● Make any modifications from Executive Director ● Submit to Board of Directors for acceptance <p>Work plans</p> <ul style="list-style-type: none"> ● Review all work plan templates currently being utilized in the organization ● Finalize one work plan template for use within the organization ● Establish procedure for changing work plan templates ● Establish procedure to complete work plan ● Staff work plan process implemented with staff <p>Job descriptions</p> <ul style="list-style-type: none"> ● Create a folder of all job description approved and not yet approved by board ● Review all job descriptions and create a job description template for all staffing ● Ensure all job description within the organization follow the approved template ● Finalize all job descriptions ● Develop procedure for completing and updating job descriptions

	<p>Staff agreements</p> <ul style="list-style-type: none"> ● Review existing staff agreements in place ● Make an agreement template ● Create agreements for individual staff based off job descriptions and roles and responsibilities identified ● Review with Executive Director and make amendments ● Have all staff sign agreements
<p>Staff succession</p>	<p>Identify key areas and positions that are critical to the organization's operational activities and strategic objectives.</p> <ul style="list-style-type: none"> ● Identify which positions, if left vacant, would make it very difficult to achieve current and future organization goals ● Identify which positions, if left vacant, would be detrimental to the health of the organization ● Develop succession planning guidelines and policies for critical job positions in the organization <p>Identify capabilities for key areas and positions to establish selection criteria, focus employee development efforts, and set performance expectations. Identify the relevant knowledge, skills (including language), abilities, and competencies needed to achieve organization goals</p> <ul style="list-style-type: none"> ● Use the Key Leadership Competencies profile ● Inform employees about key areas and positions and required capabilities <p>Identify interested employees and assess them against capabilities to determine who is interested in and has the potential to fill key areas and positions.</p> <ul style="list-style-type: none"> ● Discuss career plans and interests with employees ● Identify the key areas and positions that are vulnerable and the candidates who are ready to advance or whose skills and competencies could

	<p>be developed within the required time frame</p> <p>Develop and Implement Succession and Knowledge Transfer Plans- Incorporate strategies for learning, training, development, and the transfer of organization knowledge into succession planning and management.</p> <ul style="list-style-type: none"> ● Define the learning, training, and development experiences that your organization requires for leadership positions and other key areas and positions ● Link employees' learning plans to the knowledge, skills (including language), and abilities required for current and future roles ● Discuss with employees how they can pass on their organizational knowledge <p>Evaluate Effectiveness- Evaluate and monitor your succession planning and management efforts to ensure the following:</p> <ul style="list-style-type: none"> ● Succession plans for all key areas and positions are developed. ● Key positions are filled quickly. ● New employees in key positions perform effectively; and ● Members of designated groups are adequately represented in feeder groups for key areas and positions
Policy and procedures for human resource management	<ul style="list-style-type: none"> ● Determine where all policies and procedures are located and create folder ● Review all documents to establish a list of what policies and procedures are already in place ● Determine the policies needed ● Determine all procedures that need to be written for each policy
Training	<p>Staff training identified</p> <ul style="list-style-type: none"> ● Find all existing staff training documents and create folder ● Share folder with all involved in creating survey to go to all staff ● Send survey to Director of Engagement and Development & Consultant for review

	<ul style="list-style-type: none"> ● Review survey with Executive Director ● Send survey to all staff ● Compile all staff needs into a priority review <p>Training plans</p> <ul style="list-style-type: none"> ● Develop individual training plans for staff ● Create quarterly training schedule ● Submit training plan to Services Quebec ● Implement developed training plan
Staff future planning	<ul style="list-style-type: none"> ● Analyze organizational plans and objectives ● Prepare human resource inventory ● Assess future supply and demand ● Assess staff needs that aren't being met within departments ● Create budget to determine cost of additional staff ● Match supply and demand and establish an action plan to acquire all additional staff needed

5.2.2 Outputs from Process

The following documents and plans will be produced as a result of the restructuring process in this development area:

- Staff Orientation Manual
- Staff Onboarding guide
- Employee Handbook
- Work plan template
- Staff job description
- Staff agreements
- Staff succession plans for key positions
- Training survey
- Training Plan for all human resources
- Action Plan for human resource future growth needs

5.3 Financial Management

Nonprofits have an obligation to act as responsible stewards in managing their financial resources. Nonprofits must comply with all legal and financial requirements and should adhere to sound accounting principles that produce reliable financial information, ensure fiscal responsibility, and build public trust.

In this context, the Coasters Association uses its financial resources to accomplish its missions in effective and efficient ways and has established clear policies and practices to regularly monitor how

funds are used. The Coasters Association has sought to maintain an operational model that will offer reliable, flexible, and diverse resources to accomplish the organization's mission.

How does finance management work

A good reputation as an accountable organization is a huge asset when liaising with stakeholders. Nonprofit financial leadership for the organization encompasses more than just tracking revenue and expenses — it is the process of guiding resources through an organization in the service of its mission, tending those resources to support that mission most effectively, and retaining enough of those resources to set up the organization for longevity and stability. It is more than good accounting and requires a diverse set of skills and experience.

The importance of financial management

Below is a list of various functions and areas of compliance that the Coasters Association has or plans to put in place to ensure sound financial management practices:

Functions

- The board should annually review and approve a detailed written budget of revenues and expenditures and gain a sufficient understanding of the assumptions behind the budget's development when doing so.
- The Director of Finance should prepare and present to the board consistent, timely, and accurate financial reports, with comparisons to the organization's budget.
- A system of internal controls should be formally adopted by the board to ensure separation of financial duties to serve as a check and balance system to prevent theft, fraud, or inaccurate reporting.
- The organizations will adopt written financial procedures and have appropriate financial management software to record revenues and govern major expenses and use of assets, including cash and in-kind contributions, payroll, leases, expense reimbursements, travel, contracts, consultants, and use of debt.
- The acceptance of funds from government entities should be on terms that ensure payment levels, conditions, and reporting requirements that are consistent with the mission of the organization and the interest of the people being served.
- The organization will periodically assess financial risks, take appropriate actions to minimize these risks, and purchase appropriate types and levels of insurance to wisely manage liabilities.
- The board should use comparable market data to set compensation for the organization's executive director and other senior employees and stay informed of compensation levels for other key personnel.
- Board members and key staff should clearly understand how to read and interpret financial statements, including the limits on the use of restricted funds in nonprofit organizations and the role of debt.
- The board treasurer should take a leadership role in helping the board understand its duties regarding financial management. The treasurer also should foster board awareness of the organization's current financial condition, forecast revenue, and need to make timely adjustments in expenditures to keep the organization healthy.

Compliance

- The organization must comply with all financial regulations, such as withholding and payment of federal, provincial, and payroll taxes, and manage donated funds according to their restrictions.
- The board should designate the executive committee to hire the auditor, oversee the audit process, meet with the auditor to review the audit’s content, and present the audit’s findings to the full board for its review and approval.
- The organization should have systems in place to protect individuals who report financial misconduct from any negative repercussions for having done so.

The areas highlighted in maintaining financial accountability and transparency as part of the organization’s operations were policy and procedures, finance software, staffing, training, and budgeting.

5.3.1 Work Plan

Restructuring Areas	Activities
Systems for Finance Management	<p>Software Decide on new software for finance department</p> <p>Secure funding for software</p> <p>Develop software with company selected</p> <p>Develop training tool and train staff within finance department to utilize software</p> <p>Develop training tool and train additional staff in organization on how to use and access applications within new software</p> <p>Finance manual Draft finance manual</p> <p>Submit to staff for any revision</p> <p>Submit to Executive Director for review</p> <p>Submit to Board of Directors for approval</p> <p>Review of Time Sheet Management Create a process for timesheets Develop procedure document for Directors to manage time sheets and set parameters for overtime</p> <p>Develop roles and responsibilities for Directors and</p>

	<p>managers that manage staff time sheets</p> <p>Evaluate expense advance and travel claim forms Meet with finance department to discuss challenges</p> <p>Meet with general staff to discuss challenges. Redesign expense claim if necessary</p> <p>Set up procedure for expense advance forms and travel claims</p>
Salary for Staffing	<p>Staffing budget for finance department Create a budget to staff three (3) personnel within finance department</p> <p>Create a financial plan to maintain staffing within finance department</p> <p>Staffing within divisions Meet with each division to discuss current staffing and future needs</p> <p>Meet with finance department to create five-year budget projections</p>
Compliance	<p>Pay Equity Complete spreadsheet to have quote for pay equity completed</p> <p>Submit documentation to Pay equity consultant</p> <p>Submit quote to Services Québec to obtain financing</p> <p>Complete pay equity process with consultant</p> <p>Review report with Executive Director, Human resources department and Board of Directors</p> <p>Execute any recommendations</p>

5.3.2 Outputs from Process

The following documents and plans will be produced as a result of the restructuring process in this development area:

- Training tool for finance software
- Finance manual
- Recommended procedures
- Time sheet
- Advance expense claim
- Travel claim
- Financial plan for staffing within finance department
- Five (5) year budget projections for staffing within two (2) divisions
- Pay equity report

5.4 Procurement and Facility Management

The procurement process includes the preparation and processing of a demand as well as the end receipt and payment. Comprehensively, this can involve purchase planning, standards, specifications determination, supplier research, selection, financing, price negotiation, inventory control and storage.

In order to have materials available to provide services in a timely manner the materials need to be identified, ordered, purchased, inventoried, and stored. In addition, there must be an efficient means of access to and a consistent supply of these items which indicates that the flow of materials needs to be documented and analyzed. Oftentimes the demand for a material or set of materials for a specific service is related to the demand for materials for another related service and these variants need to be considered in planning the distribution of the materials.

The term “technology” not only encompasses items commonly thought to be technological such as computer systems, printers, i-pads, etc..... In operations management, technology refers also to human technology because of the contribution of the expertise of the individuals who work in the organization. Recently the concept of technology has been broadened further to include systems where practical application of knowledge for the prevention, diagnosis, and maintenance of the equipment. Management decisions regarding the acquisition of technology must be carefully made with consideration of the financial status of the organization. The use of capital in any business requires an assessment of current needs and projections of future needs. Therefore, operations decisions must be made in cooperation with the financial planning strategies.

Facilities management can be defined as the tools and services that support the functionality, safety, and sustainability of buildings, grounds, infrastructure, and real estate. Facilities management includes:

- Lease management, including lease administration and accounting
- Capital project planning and management
- Maintenance and operations
- Energy management
- Occupancy and space management
- Employee and occupant experience
- Emergency management and business continuity
- Real estate management

Regarding facilities management, the Coasters Association has or has access to a multitude of infrastructures that house the services delivered by the organization throughout the territory. It is important that these facilities be assessed to ensure that they are adequate to accommodate the work that must be done and that they are set up to facilitate efficient service delivery and that they are safe

for use by employees of the organization. It is also necessary to ensure agreements and proper insurance are in place for all the infrastructure in which the organization operates.

5.4.1 Work Plan

Restructuring Areas	Activities
Materials management	<p>Supplies Create inventory system for supplies</p> <p>Supplies future planning budget completed and procurement plan created</p> <p>Procurement request form created for supplies</p> <p>Write policy and procedure for procurement and management of supplies</p> <p>Equipment (i.e. ovens, microwaves, kitchen materials, etc.) and furniture Equipment database created</p> <p>Equipment wish lists completed with staff</p> <p>Equipment future planning budget completed, and procurement plan created</p> <p>Procurement request form created</p> <p>Equipment maintenance form created</p> <p>Lost equipment report form created</p> <p>Write policy and procedure for procurement and management of equipment</p>
Technology Management	<p>Technology equipment (computers, printers, i-pads, i-phones, etc.) Technology equipment inventory database completed</p> <p>Technology equipment wish list completed</p> <p>Develop an annual budget for technology equipment needed</p> <p>Create an inventory system for technology equipment that includes password management system</p> <p>Create a supply request form for technology equipment</p>

	<p>Create a system for troubleshooting technology issues and repairs</p> <p>Write policy and procedure for procurement and management of technology equipment</p> <p>Software</p> <p>Software inventory database completed</p> <p>Software wish list completed</p> <p>Develop an annual budget for software needed</p> <p>Create an inventory system for software that includes password management system</p> <p>Create a supply request form for software</p> <p>Write policy and procedure for procurement and management of software</p>
Facilities Management	<p>Get all address and locations of buildings and create database with information</p> <p>Complete agreements for offices that are in partner buildings</p> <p>Evaluate insurance on buildings and make adjustments to insurance policy if necessary</p> <p>Write policy and procedure for procurement and management of facilities</p>

5.4.2 Outputs from Process

The following documents and plans will be produced as a result of the restructuring process in this development area:

- Equipment database
- Technology equipment database
- Procurement plan
- Procurement request form
- Equipment maintenance form
- Lost equipment report form
- Supplies inventory system
- Supply request form for supplies
- System for troubleshooting technology issues and repairs
- Supply request form for software

- Software inventory database
- Inventory system for software that includes password management system
- Annual software budget
- Database of all office locations throughout the territory
- Agreements for offices in partner locations
- Insurance evaluation report
- Policy and procedure list

5.5 Project Management

A project is a temporary and unique endeavor designed to produce a product, service, or result with a defined beginning and end (usually time-constrained, and often constrained by funding or staffing) which has been undertaken to meet unique goals and objectives, typically to bring about beneficial change or added value. The temporary nature of projects stands in contrast to regular operations, which are repetitive, permanent, or semi-permanent functional activities to produce products or services. In practice, the management of such distinct production approaches requires the development of distinct technical skills and management strategies.

Project management is the process of leading the work of a team to achieve all project goals using available resources and within the given constraints. This information is usually described in project documentation which is created at the beginning of the development process.

The objective of project management is to produce a complete framework for the project in question and which complies with the organizations and funder's objectives. Once the organization's/funder's objectives are clearly established they should influence all decisions made by those involved in the project – for example project directors, managers, animators, designers, consultants, etc. Ill-defined or too tightly prescribed project management objectives are detrimental to effective decision making.

Managing a project is no easy feat, no matter what the scale and scope are. From planning the minutia to handling the ever-changing demands of funders, stakeholders and clients, to carrying out the deliverables on time, there's a lot that can end up in a direction different from the intended plan. When the project is divided into manageable stages, each with its own objectives and deliverables, it's easier to control the project and the quality of the output.

5.5.1 Workplan

Restructuring Areas	Activities
Project Management Documentation	<p>Project Management Guide Create project management guide that outlines staff responsibility in the following areas:</p> <ol style="list-style-type: none"> 1. Project Initiation 2. Project Planning 3. Project Execution 4. Project Monitoring and Controlling 5. Project Closing <p>Review Project Management Guide with Directors and make any changes necessary</p>

	<p>Review Project Management Guide with Executive Director and make any changes necessary</p> <p>Present Project Management Guide to Board of Directors for adoption</p> <p>Project Charters and Contracts Review current project and contracts template at the Northern research Center level</p> <p>Change Management Create change management procedure that outlines the mechanism used to initiate, record, assess, approve and resolve project changes</p>
<p>Implementation of Project Management Software (WRIKE)</p>	<p>Process management Complete inventory of all projects within the organization</p> <p>Establish staff responsible for each project</p> <p>Identify the workflow start and end</p> <p>Implementation Define the “Rules of Wrike” with the implementation Team.</p> <p>Set up standard operating procedures of how your organization/team will interact with Wrike.</p> <p>Identify people who might be resistant to change. Hold individual conversations about Wrike with individuals to better understand and address their concerns.</p> <p>Have a “Wrike Introduction Session” with all users. Give an introductory demo of Wrike. This is not meant to be a training session — that comes later. In this meeting we will cover the following:</p> <p>Why we are using Wrike: the objectives What will be done in Wrike: projects, processes and deliverables Who is expected to use Wrike: teams and individuals How people are expected to interact within Wrike: the “Rules of Wrike” When the User Trainings will take place: dates and times Establish full implementation date definition</p>

	<p>Complete Workspace Set-up with staff Work with individual staff to ensure their Wrike workspace is set up</p> <p>Staff input their information into spaces, folders and projects</p> <p>Staff input all tasks, subtasks, person(s) responsible and timelines</p> <p>Templates Create necessary templates and process workflows for staff to use within Wrike that can be used in all projects</p> <p>Training Complete internal training plan for Wrike</p>
Training	<p>Develop survey for staff training needs</p> <p>Draft training document for staff and submit to Services Quebec regarding project management Create individual training plans for staff</p> <p>Complete training schedule with staff as per individual training plans</p>

5.5.2 Outputs from Process

The following documents and plans will be produced as a result of the restructuring process in this development area:

- Policy and procedure list
- Project management guide
- Project charter and contract template (Northern Research Center)
- Wrike introduction and training documents/videos
- Wrike implementation process
- Survey for staff training needs
- Staff individual training plans
- Staff training schedules

5.6 Communication Management

Communication management is the systematic planning, implementing, monitoring, and revision of all the channels of communication within an organization, between organizations and to external audiences; it also includes the organization and dissemination of new communication directives connected with an organization, network, or communication technology. Aspects of communications management include developing organizational communication strategies, designing internal and external communications directives, and managing the flow of information, including online

communication. It is an important process that helps an organization to be systematic in all facets of communication.

Communication and management are closely linked together, literally going hand in hand. Since communication is the process of information exchange between two or more people, and management includes managers that basically give out information to those for whom and with whom they work with. Without the advantage of a good communications management system, the cycles associated with the development of a task, from start to finish, can be compromised. It also gives fundamental project integrity needed to give informational assistance to all individuals on the team and is the action component, the integrator of the process toward assembling the project. As project management is both craftsmanship and science, good communications allow the project manager to lead in a multidisciplinary fashion.

5.6.1 Work Plan

Restructuring Areas	Activities
Communication Plan	<p>All staff have read existing communication plan and given feedback</p> <p>Create a working committee and bi-weekly work sessions held to review communication plan and create implementation plan</p> <p>Create timeline to 2025 for full implementation</p> <p>Send Executive Director for review</p> <p>Deposit to board for review and approval</p>
Social Media Planning	<p>Research all current templates in use and share on Wrike for feedback from staff</p> <p>Work with Communication Team and Directors to finalize new template</p> <p>Develop procedure for staff to submit social media content</p> <p>Create template for directors to input themes into</p> <p>Directors submit all themes by month for upcoming year</p>
Event Planning	<p>Create a template for the divisions to enter events into</p> <p>Send to restructuring committee for review</p>

	<p>Decide with management teams what events will be held throughout the year</p> <p>Send template to all staff and give staff time to enter dates into calendar review all upcoming events with Executive Director</p> <p>Create event planning guide and toolkit, research what was done previously and all previous documents with teams decide who will lead creation of the event toolkit draft toolkit</p> <p>Share with team for feedback and then, send to Executive Director</p> <p>Present final toolkit to board</p>
Website Implementation	<p>Set-up of procedure for website changes and additions</p> <p>Identification and set-up of training for making changes on the website</p> <p>Create training manual for making website changes</p> <p>Complete training with staff identified responsible for the web site</p> <p>Management system created for all passwords procedure created</p> <p>File system created for all passwords</p>
Print Media Planning	<p>Find and create a folder for all brochures, newsletters, strategic plans, ticket templates, posters, etc...</p> <p>Individual teams review current content and make necessary modifications based off feedback</p> <p>Teams give modified content</p> <p>Decide inventory needed</p> <p>Create template to track inventory</p>

	Create budget for annual printing
Google workspace management	<p>Administration of google workspace</p> <p>Three staff have administrative privileges</p> <p>Staff account set-up procedure</p> <p>Procedure created for Directors to let Executive assistant know they are hired</p> <p>Google Workspace staff training</p> <p>Set up up folder of training videos for onboarding staff</p> <p>Complete individual assessment tool for staff on google workspace proficiency and set-up training</p> <p>Shared drives management</p> <p>Administrative staff complete training on shared drives management</p> <p>A file system for the shared drives is drafted</p> <p>Share revised filing system with Directors to make modifications to current filing system</p> <p>Research how to track when files are changed in shared drive, develop and implement a new shared drive file management system</p> <p>Set up new shared drive filing system</p> <p>Develop a procedure for staff utilization of the shared drive</p>
Salary for Staffing	<p>Staffing budget for communication department</p> <p>Create a budget to staff three (3) personnel within communication department</p> <p>Create a financial plan to maintain staffing within communication department</p>
Training and Coaching Identification	Meeting with communication staff and directors to discuss training needed for staff

	<p>Finalize list and cost of training</p> <p>Input training in individual training and coaching plans of staff</p>
Policy and procedure	<p>Place all current policies and procedure documents into Wrike so staff can review and give feedback</p> <p>Make list of policies and procedures needed regarding communication</p> <p>Share list of policies and procedures with staff to see if anything missing</p> <p>Create policies and procedures</p> <p>Send to Executive Director for review</p> <p>Send to Directors for review</p> <p>Present to Board of Directors for adoption</p>

5.6.2 Outputs from Process

The following documents and plans will be produced as a result of the restructuring process in this development area:

- Communication Plan
- Implementation Plan for Communication Plan
- Template for recording yearly events
- Event planning guide and toolkit
- Calendar of themes for social media
- Template for inputting social media
- Inventory tracking form for print media
- Online folder for all copies of printed materials
- Training manual for website changes
- Online folder for G-suite training videos
- Individual assessment tool for staff on google workspace proficiency
- Training plan for staff on G-suite
- G drive filing system
- Management system for passwords
- List of training needs
- List of policies and procedures

5.7 Risk Management

Risk management is the identification, evaluation, and prioritization of risks (defined in ISO 31000 as *the effect of uncertainty on objectives*) followed by coordinated and economical application of resources

to minimize, monitor, and control the probability or impact of unfortunate events or to maximize the realization of opportunities.

Risks can come from various sources including uncertainty in funding, threats from project failures (at any phase in design, development, delivery, or sustaining of life cycles), legal liabilities, credit risk, accidents, natural causes and disasters, cyber security attack, or events of uncertain or unpredictable root causes. There are two types of events: negative events can be classified as risks, while positive events are classified as opportunities. Risk management standards have been developed by various institutions, including the Project Management Institute, the National Institute of Standards and Technology, actuarial societies, and ISO standards.

Strategies to manage threats (uncertainties with negative consequences) typically include avoiding the threat, reducing the negative effect or probability of the threat, transferring all or part of the threat to another party, and even retaining some or all the potential or actual consequences of a particular threat. The opposite of these strategies can be used to respond to opportunities (uncertain future states with benefits).

5.7.1 Work Plan

Restructuring Areas	Activities
Partnership management	<p>Current Partnerships Partnership development and process stakeholder analysis grid created</p> <p>Identify all partnerships that have written agreements</p> <p>Develop and describe the types of partnerships into decided-upon categories</p> <p>Partnership Interactions Review individuals and groups that require permissions for communication from the Executive Director</p> <p>Create flow chart for interacting with individuals and groups</p> <p>Develop protocol and procedures for developing and maintaining partnership</p>
Communities	<p>Create document explaining situation of each community</p> <p>Maintain Community Profiles</p> <p>Create protocol for interacting with communities</p> <p>Complete updated list of leaders, organizations and key contacts</p>

	<p>Create procedure for onboarding staff and updating staff within the organization of changes within the communities</p> <p>Create complaint form for community members</p> <p>Create procedure for receiving complaints</p>
Exterior	<p>Create procedure for ensuring all contractual agreements meet all the parameters listed in the contracts</p> <p>Create complaint form and procedure for external partners</p>
Board of Directors	<p>Board Handbook and Onboarding</p> <p>Create procedure for distribution of Board handbook and board onboarding and integration of board members</p> <p>Board Partnerships</p> <p>Create list of all members of the board that sit on partnership committees</p> <p>Create flow chart for interacting with individuals and groups</p> <p>Create procedure for Coasters Association board members that represent the organization on external boards</p> <p>Board Committees</p> <p>Review all roles and responsibilities of committees and make necessary adjustments</p> <p>Set-up a meeting structure and schedule for board committees</p> <p>Create procedure for working with board committees</p> <p>Sector Seats</p> <p>Review current list of board seats consult to see if all seats are still relevant make changes if necessary</p> <p>Check bi-laws for any parameters and make adjustments if necessary</p>

	Develop a procedure for interactions between assigned board sector seats and staff team leaders
Strategic Plan Implementation	Create procedure for monitoring implementation of Coasters Association Strategic Plan, Northern Research Center Plan, Wellness Center Plan and Communication Plan
Utilization Management	Create policy and procedure for: <ul style="list-style-type: none"> ● Financial reporting ● Financial accountability ● Human resource planning ● Capital Planning ● Service Planning
Safety	<p>Occupational Health and Safety Research first aid requirements for staff are met and put in place schedule for first aid training</p> <p>Create orientation and staff training document on safety in the workplace</p> <p>Develop a procedure and schedule for workplace safety inspections</p> <p>Create all necessary policy and procedures for staff</p> <p>Building safety Research all regulations pertaining to building safety</p> <p>Create a tool for assessing all facilities in operation for fire safety, security, etc....</p> <p>Create a schedule for conducting assessments</p> <p>Create a safety plan for all facilities</p>
Quality Improvement	<p>Internal and External reporting: Create an internal mechanism within the organization to monitor all internal and external reporting dates</p> <p>Create procedure for sign off at administration for reports</p> <p>Quality Service Assessments: Create and implement staff satisfaction surveys</p> <p>Review all current client surveys within the organization Create and implement client satisfaction surveys that are missing</p>

	Create and implement partner satisfaction survey
Integrated Risk management	<p>Create a preventative maintenance procedure for all building owned by the organization</p> <p>Create a procedure to handle risks at events</p> <p>Create a procedure to monitor insurance within the organization (i.e., board of directors, operations and facilities)</p>

5.7.2 Outputs from Process

The following documents and plans will be produced as a result of the restructuring process in this development area:

- List of Policies and Procedures
- Stakeholder analysis grid
- Flow chart for interacting with individuals and groups
- Schedule for first aid training
- Document outlining community profiles and situations
- Complaint form for community members, staff and partners
- Board Committee database
- Board Committees Roles and Responsibilities
- Database of board members sitting on partner committees
- Staff satisfaction survey
- Client satisfaction Survey
- Partner Satisfaction Survey
- Safety Plan for facilities
- Facility safety assessment tool
- Schedule for assessing facility safety
- Meeting structure document for board committees
- Staff training and orientation documents regarding safety

5.8 Stakeholder Engagement

The management of a stakeholder engagement process involves seeking extended support from stakeholders for a project's success. This process of communicating and working with stakeholders to meet their needs/expectations, addressing issues as they occur and building appropriate stakeholder engagement in project activities throughout the life cycle of the project, is termed as Management Stakeholder Engagement process.

Activities involved in a Management Stakeholder Engagement process:

- Ensure commitment of stakeholders at all stages of the project
- Ensure stakeholder expectations are met using a variety of tools including negotiations and communication
- Anticipation of future problems and addressing potential concerns throughout the life cycle of the project

- Tracking stakeholder engagement activities via a client management database

A few critical points in managing stakeholder engagement includes:

- Stakeholder influences are the highest at the start of the project and as the project progresses the influences continue to diminish
- Ensuring consistent communication throughout the lifecycle of a project
- The continuation of stakeholder engagement practices beyond a specific project life cycle

Inputs to Manage Stakeholder Engagement

This includes a Stakeholder Management Plan, Communications Management Plan, Changelog and Organizational Process Assets. The communications management plan includes a documentation of stakeholders’ needs for communication requirements. Every stakeholder needs information for a specific purpose and thus the formats, level of detail, content and language might need some alteration from stakeholder to stakeholder. All of this needs to be taken into consideration as inputs when Managing Stakeholder Engagement.

Tools and techniques used to Manage Stakeholder Engagement include effective communication methods such as the use of email, meetings, process updates through the internet, tracking of communications and engagement opportunities, amongst others. The project manager uses effective interpersonal skills including active listening, building trust, resolving conflict and overcoming resistance to change. Like interpersonal skills, the project manager also requires management skills such as effective facilitation of consensus towards achieving project objectives, influencing people to support the project, negotiate agreements to satisfy project needs and help modify organizational behavior to accept project outcomes.

5.8.1 Workplan

Restructuring Areas	Activities
Control Stakeholder Management	<p>Database management</p> <p>Add all current contact lists into one folder</p> <p>Decide on a digital tool to manage databases</p> <p>Integrate all databases</p> <p>Create procedure for database management</p>
Plan Stakeholder Management	<p>Create a database of all stakeholders</p> <p>Create a Stakeholder Management Plan</p> <p>Create a Stakeholder Communications Management Plan</p> <p>Create issues log form</p>

	<p>Create a Change Request and Log form for when staff or stakeholder change</p> <p>Create an organizational process assets (OPA) file folder for each stakeholder. Some examples of what could be in OPAs file folder are:</p> <ul style="list-style-type: none"> ● Previous Project Plans. ● Software Tools. ● Database of Project Information. ● Lessons Learned. ● Knowledge Base. ● Organizational policies and procedures. ● Historical Information. ● Project Templates.
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5.5.2 Outputs from Process

The following documents and plans will be produced as a result of the restructuring process in this development area:

- Digital database tool
- Database of stakeholders
- Stakeholder Management Plan
- Issue Logs
- Change Requests Form and Log
- Organizational process assets (OPA) file folder for each stakeholder

6. Conclusion

The restructuring of the Coasters Association, with the aim of facilitating innovative initiatives and mobilizing community support, will help build a stronger organization capable of handling any and all challenges that the sixteen communities on the Lower North Shore might have to face. In partnership with community leaders, organizations and stakeholders, the Coasters Association will now be able to better design and deliver community strategies, programs and services which respond to the needs and expectations of the region.

The restructuring exercise not only better positions the organization for the work that it carries out today but lays the foundation for future growth and expansion. The organization has strengthened its internal capacity to manage growth and change moving forward with the establishment of a parent organization, two divisions and teams within the divisions. These structural changes are supported by a new operational framework, revised and renewed policies and procedures and a training program for board and staff.

Through the outcomes of the restructuring process, the Coasters Association can clearly show that the organization is still committed to the vision that was created over 33 years ago, and now more capable in delivering the goods!

ANNEX 1- Organization Internal committees (board)

Executive/Human Resources Committee

Background

The Coasters Association has full-time (permanent and non-permanent) and part-time (non-permanent) employees who they have engaged for the organization's operations as well as those for projects in conjunction with partners. The management of these personnel is supervised by the Coasters Association's Executive Committee, managed by the Executive Director, and administered as delegated by the Executive Director. The Coasters Association is fast becoming a considerably sizable organization and continues to grow exponentially. It is in this respect that it's becoming more difficult to deal with issues that arise in terms of employees.

Mandate

The Coasters Association Executive Committee acts on behalf of the Board to deal with any personnel matters. Its objectives are:

- To provide direction to the Board on human resource matters.
- To review and update the Succession Plan annually.
- To maintain human resource policies, employee job descriptions, roles and responsibilities, timelines and action plans, and recommend any changes to the Board.
- To participate in and recommend the hiring and/or release of, or issuance of notice to any employee.
- To review and prepare agreements for contracted staff.
- To deal with any personnel/human resource issues that arise.
- To act as a resource on any personnel matters, including those related to volunteers.
 - To review all employee incidents and make recommendations to the board of directors
 - Develop pertinent charts (employee incident chart) pertaining to the employees
 - Record employee conduct and behavior
 - Ensure that the rules and regulations and policies have been reviewed by all staff

Members

Eileen Schofield, President

Johanne Beaudoin, Vice-President

Tony Roberts, Treasurer

Gloria Bobbitt, Secretary

Dean McKinnon, Member

Glen McKinnon, Member

Cornella Maurice, Executive Director

Priscilla Griffin, Office Manager

A selection committee comprised of three (3) available members will be established from the members of the Executive Committee to select candidates for job opportunities.

A Committee will be established from the members of the Executive Committee to conduct employee evaluations:

Background:

The Coasters Association has full-time (permanent and non-permanent) and part-time (non-permanent) employees who they have engaged for the organization's operations as well as those for projects in conjunction with partners. The evaluation of the employees is managed by members of the Executive Committee in collaboration with the Executive Director, Director of Operations and Innovation and the Director of Finance. They will conduct the review of personnel employed by the organization and makes recommendations to all the members of Executive Committee. Its objectives are:

- To conduct an annual employee performance review of all employees, permanent and part-time.
- To conduct an evaluation of new employees after 3 months for performance review.
- To make recommendations related to employee status, development needs and working conditions to the Executive Committee.
- To prepare a report to present to the board of directors to develop a strategy for personnel development.

Constitution Committee***Background***

The Coasters Association has a Board of Directors which they have engaged for the organization's operations as well as those for programs/projects in conjunction with partners. The Board of Directors are the ultimate body that exercises all rights and powers outlined in the Coasters Association's general regulations. The Constitution defines the general principles regulating the mechanisms of the Coasters Association.

Mandate

The Coasters Association established a Constitution Committee since 1989, and it acts on behalf of the Board of Directors to deal with any constitutional matters. Its objectives are:

- To review the constitution annually.
- To make recommendations for amendments to the board (if any) at a regular meeting and/or special meetings of the board.
- To prepare the amendments to present to the membership at the Annual General Meeting for approval, or rejection, and/or revision.

Members

Eileen Schofield, President

Johanne Beaudoin, Vice President

Tony Roberts, Treasurer

Cornella Maurice, Executive Director

Hugh Maynard, Consultant

Annex 2: Organizations Internal Committees (staff)

Executive Management

Chair: Cornella Maurice, Executive Director

Members: Shannon Keats, Executive Assistant – Organizer of meeting & note taker
Kimberly Buffitt, Director of Engagement and Development
Kayla Kippen, Director of Operations & Innovation
Roderick Fequet, Human Resource and Community Liaison Officer
James Buckle, Director of Finance
Priscilla Griffin, Office Manager

Purpose of meetings: Share information on administration procedures, operations and management to improve productivity of the organization. Hold discussions on improving administrative processes and make decisions on recommendations received from Senior Leadership. Refer or escalate items to the Board of Directors as required and receive and distribute information and decisions made by the board to Senior Leadership to disseminate.

Number of meetings: One meeting per month (10) except for July & August

Program & Project Finance Management

Chair: Cornella Maurice, Executive Director

Members: James Buckle, Director of Finance
Kimberly Buffitt, Director of Engagement and Development
Kayla Kippen, Director of Operations & Innovation
Ida Jones, Assistant to Director of Finance

Purpose of meetings: This sub-committee will be responsible to ensure that the organization is operating with the financial resources it needs to deliver programs and services to the community. The role of the committee will be to provide financial oversight for the organization, (financial budgeting, planning and reporting) to ensure that the financial operations of the organization comply with the authorized agreements, contracts and procedures, and all deadlines are met. All pertinent information will be relayed to the appropriate Directors and/or Managers to enable them to carry out their activities in an effective and efficient manner.

Number of meetings: One meeting every second month (5 per year) - except for July & August

Senior Leadership (Directors & Senior staff)

Chair: Kimberly Buffitt, Director of Engagement and Development

Members: Kayla Kippen, Director of Operations and Innovation
Shelley Fequet, Director of Community Development & Mobilization

Chelsey Thomas, Director of Youth & Employability
Katie Roberts, Director of Northern Research Center
Latesha Fequet, Migration Agent
Roderick Fequet, Human Resource and Community Liaison Officer
Shannon Keats, Executive Assistant – Organizer of meeting & note taker
Priscilla Griffin, Office Manager

Resource persons: Shae-lynn Roberts, Researcher, Cedfob
Honlee Etheridge, Manager of Communications & Marketing

Purpose of meetings: Interdepartmental communication to disseminate information, discuss operations and implementation of Strategic Plan, update on projects and advise and make recommendations to the Executive Administration.

Number of meetings: One meeting per month (10), except for July & August

Operations (Managers)

Chair: Kayla Kippen, Director of Operations and Innovation

Members: Gabrielle Anderson, Manager of Early Childhood Development
Mason Organ, Manager of Northern Research Center Services
Jenna Maurice Gallibois, Manager of Senior services
To be determined, Manager of Northern Research Center.
Honlee Etheridge, Manager of Communications & Marketing
Priscilla Griffin, Office Manager – Organizer of meeting & note taker

Resource Persons: Latesha Fequet, Migration Agent
Shae-lynn Roberts, Researcher, Cedfob

Purpose of meetings: Interdepartmental communication to enhance and develop the operations of the organization, and to disseminate communication to departmental teams.

Number of meetings: One meeting per month (10), except for July & August

Organizational meetings – Division Centers

Wellness Center

Lead Persons: Kayla Kippen, Director of Operations & Innovation
Chelsey Thomas, Director of Youth & Development

Members: Gabrielle Anderson, Manager of Early Childhood Development
Jenna Maurice Gallibois, Manager of Senior services

Mason Organ, Manager of Nutrition North
Leatrice Collier, Education Animator of Nutrition North

Resource Persons: Latesha Fequet, Migration Agent
Shelley Fequet, Director of Community Development & Mobilization
Honlee Etheridge, Manager of Communications & Marketing
Logan Woodland - Cedfob

Purpose of meetings: It is an exchange platform to share information, opinions, insights and feedback, as well as to ensure the operations of the Wellness Center at a community level.

Number of meetings: Meetings held weekly, bi-weekly or monthly (based on need/support)

Northern Research Center

Lead Person: Katie Roberts, Director of the Northern research Center

Consultant: Kristopher Fequet, Steel River Group

Members: Mason Organ, Manager of Northern Research Center Services
Honlee Etheridge, Manager of Communications & Marketing
Leah Monger, Videographer and Coordinator of Business Development and Marketing
Samantha Tinkham, Junior Bio Development Processing Engineer

Resource Persons: Kimberly Buffitt, Director of Engagement and Development
Kayla Kippen, Director of Operations and Innovation
Latesha Fequet, Migration Agent
Shae-lynn Roberts, Researcher Cedfob
Chelsey Thomas, Director of Youth & Development
Shelley Fequet, Director of Community Development & Mobilization
Logan Woodland - Cedfob

Purpose of meetings: It is an exchange platform to share information, opinions, insights and feedback, as well as to ensure the operations of the North Research Center at a community level.

Number of meetings: Meetings held weekly, bi-weekly or monthly (**based on need/support**)

Bio-development

Director: Katie Roberts, Northern Research Center

Members: Interns/Students: Samantha Tinkham, Bio Development Processing Engineer
Leah Monger, Videographer & Coordinator of Business Development
Honlee Etheridge, Manager of Marketing and Communications

Resource persons: Shae-Lynn Roberts – Cedfob

Logan Woodland - Cedfob
Coreen Goddard - Cedfob
Kristopher Fequet - Consultant

Purpose of team meetings: These are working sessions to receive information, exchange ideas and experiences. It helps every employee to better understand their work and provides an opportunity for them to contribute to the planned activities, discuss issues and solutions.

Number of meetings: Meetings held weekly, bi-weekly or monthly (based on need/support)

Annex 3: Team Departmental meetings

Early Childhood Development	Manager: Gabrielle Anderson Animators: Shandi Bobbitt Adeline Anderson Makayla Griffin Torri Mansbridge Emily Ann Joncas
Senior Services	Manager: Jenna Gallibois Animators: Chandra Nadeau Ivonne Fuentes Karen Elaine Wellman Makayla Griffin Torri Mansbridge Bianca James
Communications	Manager: Honlee Etheridge Resource Person: Shannon Keats
Finance	Director: James Buckle Assistant to Director: Ida Jones Finance Clerk: Jessica Jones
Community Development	Director: Shelley Fequet Human Resource and Community Liaison Officer- Roderick Fequet
Youth	Director: Chelsey Thomas Migration Agent: Latesha Fequet Director: Kayla Kippen Animators: if Youth hub is approved

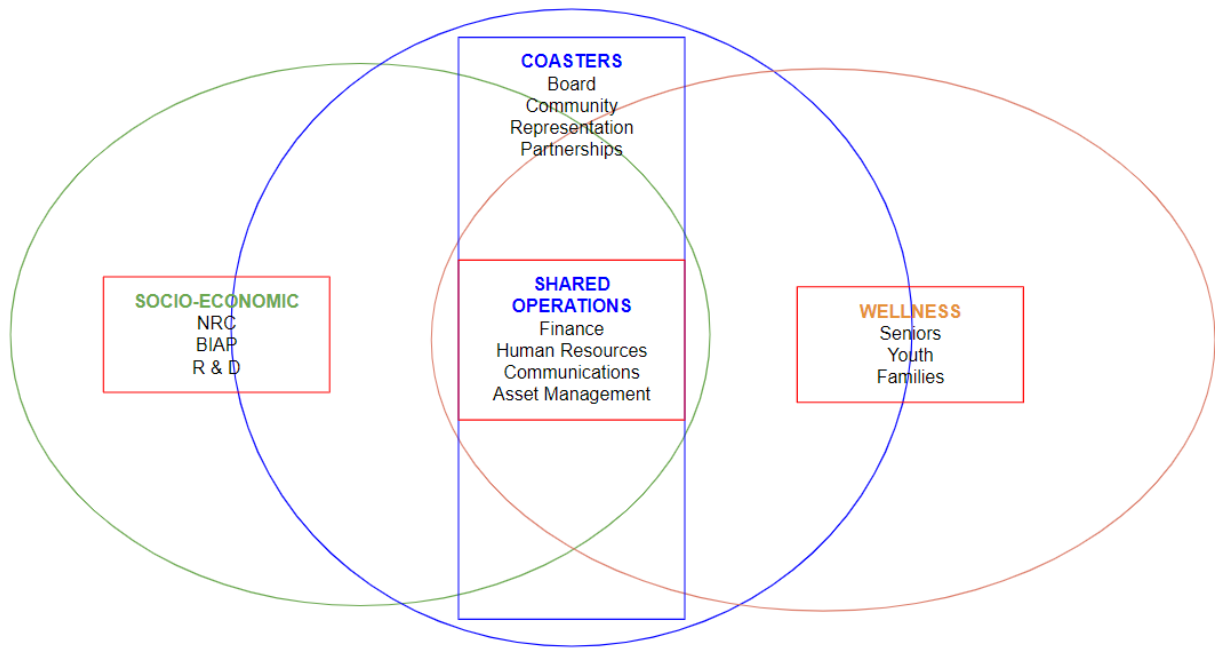
Purpose of team meetings: These working sessions provide an opportunity to receive information, exchange ideas and experiences. It helps every employee to better understand their work and provides an opportunity for them to contribute to the planned activities and discuss issues and/or solutions.

Number of meetings: Weekly, bi-weekly or monthly (based on need/support)

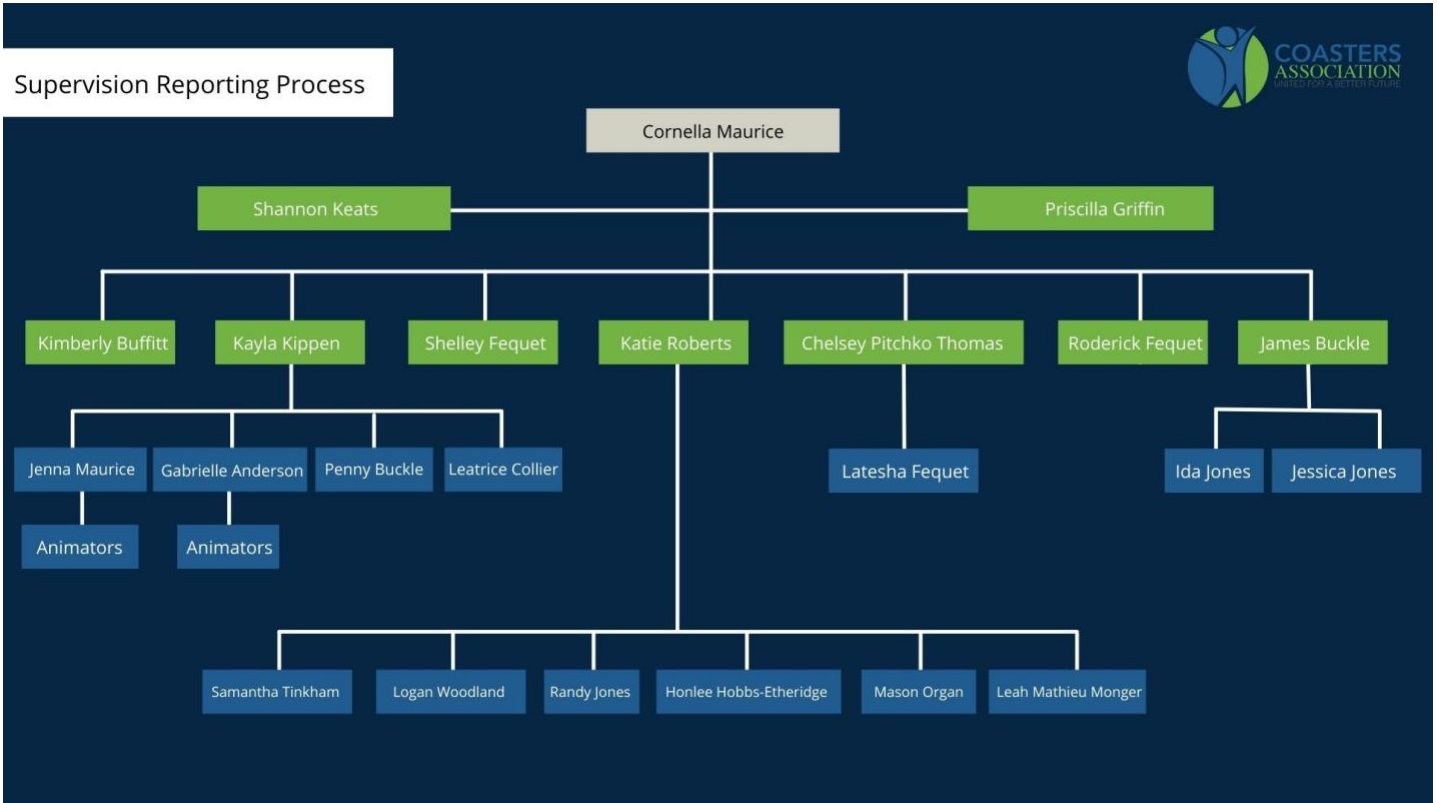
Type of Meeting	Purpose	Date/Frequency
Work sessions with Directional Teams	To have all staff give feedback on areas that are working and areas that need restructuring	November 8th to November 18th, 2021

Staff planning session	Weeklong planning session with all staff	November 22-26, 2021
Daily Executive Team Meeting	Two-hour work sessions to break down all tasks within the restructuring areas and place them into work plans. All tasks were then input into Wrike	January 17th to February 9th, 2022
Daily briefing sessions with Executive Director	Update and review sessions with the Executive Director to approve documents and review progress on restructuring plan	Daily

Annex 4: Organization Organigram



Annex 5: Employee Organigram- (needs to be revised-last version known)



**Annex 6: Listing of employees
Coasters Association Staff**

Employee/Title	Community	Telephone (Office/home/cell)	Email
Executive/Administration			
Cornella Maurice <i>Executive Director</i>	St. Paul's River Quebec G0G 2P0	(w) 418-379-2006/2356/2657 x 223 (h) 418-379-2024 (cell) 450-268-1916	cornella.maurice@coastersassociation.com
Shannon Keats <i>Executive Assistant</i>	St. Paul's River Quebec G0G 2P0	(w) 418-379-2006/2356/2657 x 223 (cell) 418-409-0119	shannon.keats@coastersassociation.com
Priscilla Griffin <i>Office Manager</i>	St. Paul's River Quebec G0G 2P0	(w) 418-379-2006/2356/2657 x 221 (h) 418-379-2996 (cell) 367-996-6884	administration@coastersassociation.com priscilla.griffin@coastersassociation.com
Roderick Fequet <i>Human Resources & Community Liaison Officer</i>	Old Fort Bay Quebec G0G 2G0	(w) 418-379-2006/2356/2657 x 235 (h) 418-379-2347 (cell) 581-620-5546	roderick.fequet@coastersassociation.com
Finance			
James Buckle <i>Director of Finance</i>	St. Paul's River Quebec G0G 2P0	(w) 418-379-2006/2356/2657 x 222 (h) 418-379-2058	james.buckle@coastersassociation.com
Ida Jones <i>Assistant to the Director of Finance</i>	St. Paul's River Quebec G0G 2P0	(w) 418-379-2006/2356/2657 x 222 (cell) 418-379-2660	ida.jones@coastersassociation.com
Jessica Jones <i>Finance Clerk</i>	St. Paul's River Quebec G0G 2P0	(w) 418-379-2006/2356/2657 x 231 (cell) 418-409-1557	jessica.jones@coastersassociation.com
Senior Leadership (Director/senior leadership)			
Kimberly Buffitt <i>Director of Development and Engagement Coasters /Steel River Group</i>	St. Paul's River Quebec G0G 2P0	(w) 418-379-2006/2356/2657 x 226 (h) 418-379-2901 (cell) 438-870-3215	kimberly.buffitt@coastersassociation.com
Kayla Kippen <i>Director of Operations and Innovation</i>	Kegaska Quebec G0G 1S0	(cell) 780-608-0809 (h) 418-726-3292	kayla.kippen@coastersassociation.com
Shelley Fequet <i>Director of Community Development and Mobilization</i>	St. Paul's River Quebec G0G 2P0	(w) 418-379-2006/2356/2657 x 229 (cell) 418-965-7764	shelley.fequet@coastersassociation.com
Chelsey Pitchko Thomas <i>Director of Youth and Development</i>	St. Paul's River Quebec G0G 2P0	(w) 418-379-2006/2356/2657 x 227 (cell) 514-792-9449	chelsey.thomas@coastersassociation.com
Latesha Fequet <i>Place aux Jeunes Migration Agent</i>	Old Fort Bay Quebec G0G 2G0	(w) 418-379-2006/2356/2657 (cell) 780-691-6291	latesha.fequet@coastersassociation.com

Shae-Lynn Roberts <i>Environmental Program Development Researcher CEDFOB (Support for Coasters employees) (Currently on Maternity Leave)</i>	St. Paul's River Quebec G0G 2P0	(cell) 438 828 6867	shae-lynn.roberts@coastersassociation.com
Kristopher Fequet <i>Project Manager Steel River Group/Coasters</i>	St. Paul's River Quebec G0G 2P0	(cell) 514-709-4513	kristopher.fequet@steelrivergroup.com
Wellness Center Team			
Gabrielle Anderson <i>Manager of Early Childhood Development</i>	Chevery Quebec G0G-1G0	(cell) 418-409-2344	gabrielle.anderson@coastersassociation.com
Jenna Maurice <i>Manager of Senior Services</i>	Old Fort Bay Quebec G0G-2G0	(w) 418-379-2006/2356/2657 x 228 (cell) 581-620-0080	jenna.maurice@coastersassociation.com
Leatrice Collier <i>Coordinator of Nutrition North</i>	Mutton Bay Quebec G0G 2C0	(w) 418-773-2228 (cell) 418-409-4237	leatrice.collier@coastersassociation.com
Penny Buckle <i>(HPP) - Health Prevention & Promotion Coordinator</i>	Old Fort Bay Quebec G0G 2G0	(cell) 819-578-9137	penny.buckle@coastersassociation.com
Northern Research Center Team			
Katie Dumaesque-Roberts <i>Director of Northern Researcher Center (Coasters and CEDED)</i>	Chevery Quebec G0G 1G0	(cell) 514-466-6077	katie.roberts@coastersassociation.com
Mason Organ <i>Manager of Northern Research Center services (Coasters and CEDEC)</i>	La Tabatiere Quebec G0G-1T0	(w) 418-773-2228 (cell) 514-442-4459	mason.organ@coastersassociation.com
Honlee Hobbs-Etheridge <i>Manager of Marketing and Communications (on sick leave)</i>	Brador Quebec G0G-2G0	(cell) 819-598-8727	honlee.etheridgehobbs@coastersassociation.com
Hailey Jones <i>Replacement</i>	Kegaska Québec G0G 1S0	(cell) 438-350-6607	hailey.Jones@coastersassociation.com
Leah Mathieu Monger <i>Videographer & Coordinator of Business Development</i>	La Tabatiere Quebec G0G -1T0	(cell) 873-455-3496	leah.monger@coastersassociation.com
Randy Jones <i>Manager, Collaborative Economic Development Lower North Shore</i>	La Tabatiere Quebec G0G -1T0	(cell) 418-444-2473	randy.jones@cedec.ca randy.jones@coastersassociation.com

<i>CEDEC & Coasters</i>			
Samantha Tinkham <i>Junior Bioprocess Engineer Intern</i>	St. Paul's River Quebec G0G 2P0	(cell) 709-725-1235	samantha.tinkham@coastersassociation.com
Logan Woodland <i>Health, Safety & Environment Officer Coasters & Technical Researcher Cedfob</i>	Old Fort Bay Quebec G0G 2G0	(cell) 780-975-1153	logan.woodland@cedfob.qc.ca
Wellness Center Animators (Seniors & Youth)			
Chandra Nadeau <i>Seniors</i>	Kegaska Québec G0G 1S0	(cell) 581-622-6155	chandra.nadeau@coastersassociation.com
Noella Guilmette <i>Seniors</i>	La Romaine Quebec G0G	(w) 418-229-2065 (w) 418-229-2912 (Danielle Collard)	dcollard@mcngsl.org
Shandi Bobbitt <i>Youth (Healthy Early years, Bright Beginnings)</i>	Chevery Quebec G0G 1G0	(cell) 819 -598-7218	shandi.bobbitt@coastersassociation.com
Ivonne Fuentes <i>Seniors</i>	Tête à la Baleine Québec G0G 2W0	(cell) 450-330-1803	ivonne.fuentes@coastersassociation.com
Karen Elaine Wellman <i>Seniors</i>	La Tabatière Québec G0G 1T0	(h) 418-773-2291	karen.wellman@coastersassociation.com
Adeline Anderson <i>Youth (PACE)</i>	La Tabatière Québec G0G 1T0	(h) 418-773-2415	adeline.anderson@coastersassociation.com
Makayla Griffin <i>Seniors & Youth (PACE) & Group Accessibility</i>	St. Augustine Québec G0G 2R0	(h) 418-947-1664	makayla.griffin@coastersassociation.com
Torri Mansbridge <i>Seniors, Youth (Healthy Early years, Bring Beginnings) Old Fort Bay & St. Paul's River</i>	St. Paul's River Québec G0G 2P0	(cell) 418-379-1213	torri.mansbridge@coastersassociation.com
Emily Ann Joncas <i>Youth (PACE)</i>	Blanc Sablon Québec G0G 1W0	(cell) 819-588-9224	emilyann.joncas@coastersassociation.com
Bianca James <i>Seniors</i>	Blanc Sablon Québec G0G 1W0	(cell) 581-620-2070	bianca.james@coastersassociation.com

Annex 7: Board of Directors 2020-2022

Name	Municipality/Sector	Coordinates
Eileen Scofield President	Municipality du Bonne Esperance St. Paul's River, G0G 2P0	(H) 418-379-2053 epnad@hotmail.com
Johanne Beaudoin Vice President	Municipality du Blanc Sablon Lourdes de Blanc Sablon, G0G 1W0	(H) 461-2394 rjobeaudoin@globetrotter.net
Gloria Bobbitt Secretary	Cote Nord du Gôlfe St. Laurent Chevery, G0G 1G0	(H) 787-2285 (F) 787-2347 globeth1@hotmail.com
Tony Roberts Treasurer	Economic Development St. Paul's River, G0G 2P0	(H) 418-379-2024 robertstony1948@gmail.com
Dean McKinnon Executive Member	Municipality du Gros Mecatina La Tabatière, G0G 1T0	(H) 418-773-2499 (W) 418-461-2143 (C) 418-554-2055 gidc_dm@xplornet.ca
Glen Mckinnon Executive Member	Municipality du St. Augustine Native Representative Pakuashipi/St. Augustine, G0G 2R0	(C) 418-444-1010 Service.tech@pakuashipu.net
Mickael Lambert	Francophone Representative Tête à la Baleine, G0G 2W0	(H) 418-266-7840 (W) 418- 242-2974 cjtb.media@hotmail.com
Greta Gallibois	Municipality du St. Augustine St. Augustine, G0G 2R0	(H) 418-947-2379 (W) 418-947-2929 ggallibois@gmail.com
SECTOR SEATS		
Dale Keats	Youth and Employability St. Paul's River, G0G 2P0	(H) 418-379-2951 (W) 418-379-2045 dale.keats@mrcgsl.ca
Stella Bobbitt	Seniors & Those with Loss of Autonomy	Chevery, G0G 1G0 (H) 581-621-3979 stellabobbitt@gmail.com

Garland Nadeau	Small Business Enterprises St. Paul's River, G0G 2P0	(H) 418-379-2048 coasters@globetrotter.net
RESOURCE SEATS		
Philip Joycey Commission Scolaire du Littoral Non-voting rights Deborah Foltin Commission Scolaire du Littoral Non- voting rights	Education Representatives 1581, boulevard Dr.-Camille- Marcoux Blanc-Sablon, G0G 1C0 Sept-Iles, G4R 1P8	(W) 418-962-5558 Poste/Ext. 5561 pjoycey@csdulittoral.qc.ca (W) 418-962-5558 DFoltin@csdulittoral.qc.ca
Baudouin Lalo Non-voting rights	La Romaine, Qc G0G 2M0 Native Representatives	(H) 418-947-1360 / 1515 baudouinlalo@gmail.com
Constance Monger Non- voting rights	Blanc-Sablon QC G0G 1C0 Centre intégré de santé et de services sociaux de la Côte- Nord (CISSSCN) Representative	(W) 418 461-2144, poste 611400 constance.monger_09ciss@ssss.gouv.qc.ca
Cornella Maurice Executive Director Non- voting rights	Coasters Association St. Paul's River, Qc, G0G 2P0	(W) 418-379-2006/2356/2657 (223) (H) 418-379-2024 cornella.maurice@coastersassociation.com
Shannon Keats Executive Assistant/ Communications Liaison Non-voting rights	Coasters Association St. Paul's River, Qc, G0G 2P0	St. Paul's River, Qc, G0G 2P0 (W) 418-379-2006/2356/2657 (234) (H) 418-379-2324 shannon.keats@coastersassociation.com
Priscilla Griffin Office Manager Non-voting rights	Coasters Association St. Paul's River, Qc, G0G 2P0	St. Paul's River, Qc, G0G 2P0 (W) 418-379-2006/2356/2657 (221) (H) 418-379-2996 priscilla.griffin@coastersassociation.com administration@coastersassociation.com
James Buckle Director of Finance Non-voting rights	Coasters Association St. Paul's River, Qc, G0G 2P0	St. Paul's River, Qc, G0G 2P0 (W) 418-379-2006/2356/2657 (222) (H) 418-379-2058 James.buckle@coastersassociation.com

Kimberly Buffitt Director of Operations and Innovation Non-voting rights	Coasters Association St. Paul's River, Qc, G0G 2P0	St. Paul's River, Qc, G0G 2P0 (W) 418-379-2006/2356/2657 (226) (H) 418-379-2901 kimberly.buffitt@coastersassociation.com
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Prepared by:

Hugh Maynard, Consultant, Quanglo Communication
Kimberly Buffitt, Director of Engagement and Development, Coasters Association Inc

Annex IX: Finance Manual

Annex X: Training needs document (to be completed)