Guidelines

Contractor Guidelines

Distribution: MSAs/Physician Societies

Approved by: Facility Engagement

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Contents

Purpose

The purpose of this document is to provide guidance and best practices for hiring of a Contractor such as a Project Manager, Project Coordinator or Administrative Assistant.[1]

Before hiring

- Identify someone to be the hiring lead to take responsibility for the recruitment process.
- Create or update a job description for the position. Accurately state roles and responsibilities as well as essential and desirable criteria (skills, aptitudes, knowledge, and experience).

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[1] A different process should be followed for hiring a consultant to work on specific engagement activities for your MSA. Please see the Consultant Guidelines on the Facility Engagement website for further information.
Contractor Definition: a person or company that undertakes a contract to provide materials or labor to perform a service or do a job.

__TIP:__ You can find job descriptions for a project manager, project coordinator, and administrative assistant on the Facility Engagement website.

- Decide whether the position should be filled by a contractor or an employee.
  - Visit our website for the employee vs. contractor document. If you are unsure or decide the position is most appropriately filled by an employee, please consult your Facility Engagement Liaison for information.
- Determine your advertising strategy based on your target pool of candidates. Consider posting the position on the Facility Engagement website, in local community newspapers, and/or consult your Facility Engagement Liaison suggestions. In any advertisements, state that you will consider only electronic applications, as appropriate.

Reviewing Applications

***OPTIONAL**: As a courtesy, advise all candidates by email that you have received their application and will contact them only if they are selected for an interview.*

- Review all applications, eliminating those that clearly do not meet the basic criteria or qualifications.

***TIP**: In your initial review of cover letters and resumes, consider separating applicants into A, B, and C piles. If you have a strong A pile once you are done, take only this group of applicants to the next step.*

- Use a transparent and objective scoring matrix (based on the job description) to make a short list of appropriate applicants (five or six) for telephone interviews.

Interviewing Candidates

***TIP**: Consider involving your FEL in the interview process as they will be able to provide guidance on skills or experience that would be helpful in the roles.*

- Analyze the job description to determine most relevant interview questions to be asked at each stage (telephone and in-person interviews)

***TIP**: Interview questions and structure should be applied consistently to all candidates. The interview guideline templates for these positions can be found on the Facility Engagement website.*

- The First step is the phone interview. The goal of this short phone interview is to narrow the field to three or four candidates for in-person interviews. The following are some suggestions for conducting telephone interviews:
  - Be curious: After a candidate answers a question, follow up with WHAT, HOW, and/or TELL ME MORE responses. Keep using this approach until you are clear about what the person is saying. If you are still unclear after in-depth probing, question their suitability.
  - Use the same set of questions for every candidate and try not to deviate. This commonality fosters consistency and accelerates your ability to discern differences between candidates.
  - Ensure that the candidate’s career goals align with those of the position. If they do not, question their suitability.

  - Keep prospective candidates focused on answering the questions that you ask them. Politely interrupt and bring them back to the original question if they get off topic or offer information that is not relevant.
  - Be very judicious when assessing the quality and relevance of answers to your questions. If you get a red flag, rule that person out.
- When all telephone interviews are completed, decide which candidates to invite to a first in-person interview. (Should an in-person interview not be possible try and have this next round of interviews via videoconference)
- Determine who on the team will conducts the first- and second-round of interviews (and sometimes third round), this should be 2 people. Provide the list of interview questions to the interviewers.
- Record notable interview points for reference when assessing and making final decisions.

  ***OPTIONAL**: As a courtesy, provide phone or written notification for all unsuccessful candidates who have participated in a telephone or in-person interview.*

Finalizing the hire

- Once you have selected your top two candidates, ask each to provide a minimum of three references from previous employers, including a current or most recent employer.
- Conduct references checks before making any offer (including a verbal offer).
- Once you have made your selection and offer, provide a written letter of acceptance and next steps.

Approval Process and Contracts

Once you have made your decision, you will need to contact your Facility Engagement Liaison for the appropriate contract.

The contract template serves as an agreement between the executive/directors and the contractor for the provision of services to the MSA. The contractor agreement is a standard template. A Staffing Contractor Agreement template is provided to assist with negotiation only the pertinent sections of the contract related to the services provided.

Approval steps Society Contractors:

1. Site support will complete the contract with new hire.
2. The site support will have the Director/Executive sign the contract.
3. A Copy of the contract should be kept for record.

Approval steps Unincorporated MSA Contractors:

1. Contract is drafted by FEI Team Member.
2. Review and complete contract with applicant.
3. Return contract to FEL and engagement@doctorsofbc.ca along with an email approval from MSA Executive (the executive will not need to sign the contract).
4. FEI Provincial office will obtain the FESC Directors signature and return the final signed copied to the hired contractor and FEL.

5. A copy of this contract will also be kept at Doctors of BC.

Please ensure that your contractor understands that they are responsible for all taxes and insurance including obtaining WorkSafe BC.

Onboarding

Day 1

- Inform other team members, board, FEL, and accountant of the start date for the new hire, and provide the person's name, phone number, and email address.
- Your FEL will send the new hire a welcome email and necessary documents and set up an introduction meeting. The FEL will also request IT credentials to the IT platforms for the new hire.
- Send key organizational documentation to the new hire in advance.
- Send a communication to key stakeholders, as appropriate, announcing the new team member.

Week 1

- Communicate expectations related to internal and external communications such as email and other written and in-person documents.
- Describe and/or provide documents related to:
    - Facility Engagement history, evolution and culture, including the local state of the MSA/Physician Society and health authority relationship.
    - Organizational chart.
    - Team members' roles.
    - Team members' contact information.
    - Current strategic plan and operational plan.
    - Current engagement activities.
    - Recent financial and annual budget information.
- Review the job description to orient the contractor to the context of the position, expectations/deliverables, key relationships, and other team members.
- Review and discuss the contract and the key points (e.g., insurance, hourly rate, reporting physician).
- Provide calendar invitations to any upcoming meetings that the Contractor is expected to attend.
- Review the IT platforms that the contractor should become familiar with and the contacts for issue management.
- Provide training as required or request training as appropriate.

Month 1 - 3

- Suggest relevant websites, newsletters, or resources to support learning.
- Identify potential learning opportunities for the new contractor to attend.

- Provide opportunities for knowledge sharing with other site support staff.
- Request an orientation with the provincial Office, as appropriate to the position or task.
- Provide regular opportunities for feedback to/from contractor.
- Conduct an official performance review at the end of the probationary period, if applicable.

Performance Management and Discipline

Performance management is an ongoing process involving a series of activities to help contractors succeed and attain organizational goals. Performance management requires regular development, support, and engagement.

- Create two-way accountability for the hire's performance through ongoing conversations with their supervisor.
- Use regularly scheduled check-ins to provide real-time feedback and coaching. Do not wait for a scheduled check-in to bring up an issue.
- Identify and proactively address any performance issues to help prevent them from escalating. Identify where additional support is needed. Maintain confidential and objective documentation of issues and actions taken. If performance issues escalate, refer to the information below in Part 4: Discipline.
- Seek informal opportunities for contractor development through peer feedback, coaching moments, and opportunities to shadow others.

Termination

If you have hired a contractor then the company may terminate the agreement by providing 30 days' notice. Please see the contract termination clause for more information.

Conducting the termination

The following are general suggestions to assist with the termination process:

> **Note:** In this section "termination process" applies to a termination without working notice. If someone is given working notice, they would **not** be asked to leave immediately.

- Conduct the termination at a neutral site, ideally at the end of the day, and at the beginning of the week.
- Have both the FEL and a senior person from the site present for the termination, one of whom will be the spokesperson.
- Keep the termination meeting as short as possible.
- Refrain from engaging in any detailed discussion about the reasons for the termination.
- Request that all site-provided equipment be returned immediately or by a specified date if not readily available. Arrange a time and place to meet as appropriate. Prepare a list of what needs to be returned to guide you and to provide to the contractor.

Following termination

- Make notes about the meeting immediately after the termination meeting in case any legal action occurs later.
- Meet with remaining team members to discuss the transition. Share any new reporting structure and reassure the team while maintaining confidentiality of the terminated contractor and the process.
- Send communications and/or set up meetings as appropriate to notify any other team members, the Board, and key stakeholders of the termination.
- If you are willing to provide a reference to the person who has been terminated, ensure that whoever is assigned to give the reference is aware of what information they may and may not share with any prospective employers.

Succession Planning

Your MSA/Physician Society may want to plan for potential vacancies. To identify which positions should be the highest priority, consider each position for the:

- Risk of the vacancy occurring.
- Organizational and/or team impact of the vacancy.
- Current short and long-term plan to address each specific position, if a vacancy were to occur.

Effective knowledge transfer

Ensuring organizational knowledge and information is transferred efficiently and effectively to new team members is a key challenge during any transition. To support effective knowledge transfer, the following tools are recommended:

- Contingency planning inventory for site information.
- Job descriptions for all staff positions and working group member information.
- Handover notes for departing contractors

Inquiries

People are the strongest asset of your MSA/Physician Societies. That means you will want to invest the time in a solid recruitment process to set you up for success in hiring the right person.

If you have questions regarding these guidelines, please contact your Facility Engagement Liaison.