



Annual Meeting

FREDERICTON

2026

June 11-13

*Deep roots.
Renewed growth.*



Treading Water: Navigating the Staff Transition
Process

with Sophie Taylor & Sonia Byrne

Land Acknowledgement

We respectfully acknowledge that New Brunswick is situated on the unceded and unsurrendered territories of the Wolastoqey, Mi'gmaq, and Peskotomuhkati peoples. We seek to repair and rebuild meaningful relationships with Indigenous peoples and honour these lands which hold the hopes of future generations.



Diversity, equity, inclusion and belonging

Co-operatives are voluntary organizations, open to all persons able to use their services and willing to accept the responsibilities of membership, without gender, social, racial, political or religious discrimination.



About Your Facilitators

Sophie Taylor

- Executive Director with Peel Halton Co-operative Housing Federation
- Member of National Education Committee
- Advocate of technology in housing co-ops for greater office efficiency (especially during times of transition)

Sonia Byrne

- Consultant & Facilitator to the Co-op Housing Sector
- Works globally with leadership teams in non-profits & organizations
- Focus on strategic planning, succession planning and minimizing stress during times of change





In this workshop...

Whether it's planned or unplanned, staff transitions can be messy business. It's important to have thorough operational processes in place to ensure a smooth transition, but what about the people part of this change?

Housing co-ops are experiencing retirements, resignations, and absences (expected and unexpected) at an increasing rate.

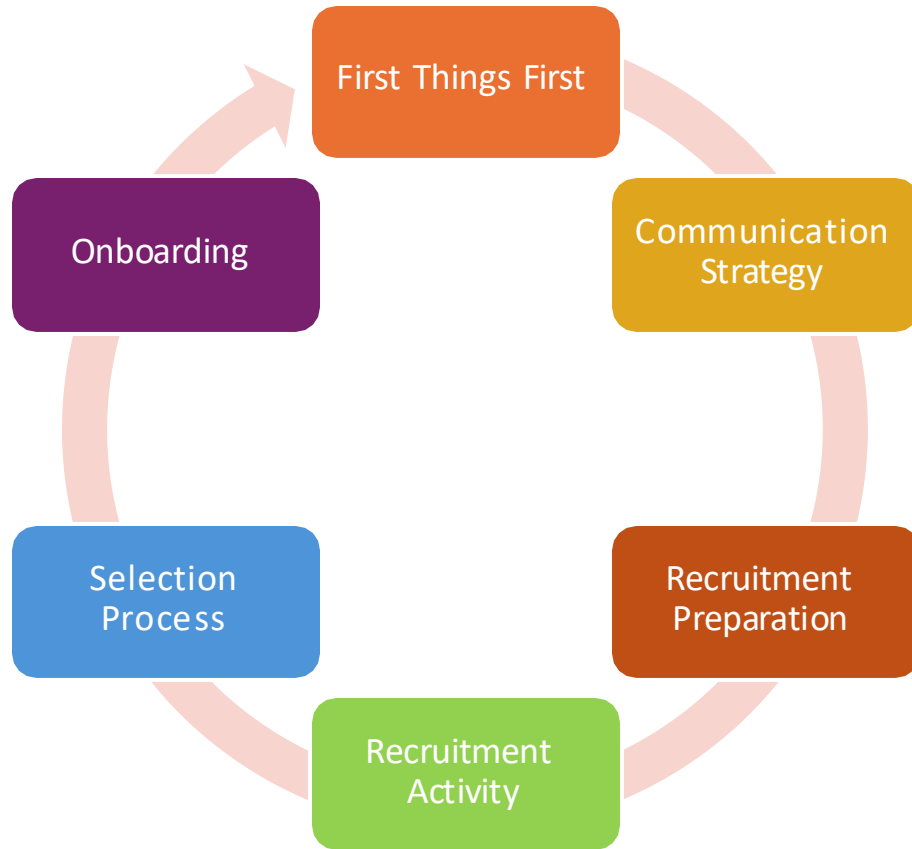
Let's work together to have your co-op feeling more organized and prepared for any eventual staff transition that could take place.



In this workshop...

In this interactive workshop, we will explore tools that co-ops can use to ensure they have the planning information required (and in place) so that the co-op can function and operate through staff transitions:

1. Build on the existing Co-op Binder Toolkit to feel more prepared
2. Gain a better understanding of where to start when things change
3. Apply the 3 C's of transition planning to possible scenarios
4. Learn to navigate the unexpected with the 4 P's of operational considerations
5. Receive the Staff Transition Checklist tool to aid in your experience



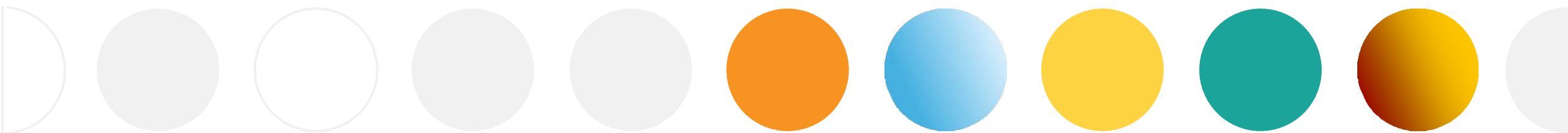
This is a working session:
We will be using the
Staff Transition Process Checklist
to plan for your own co-op.



Our session agenda

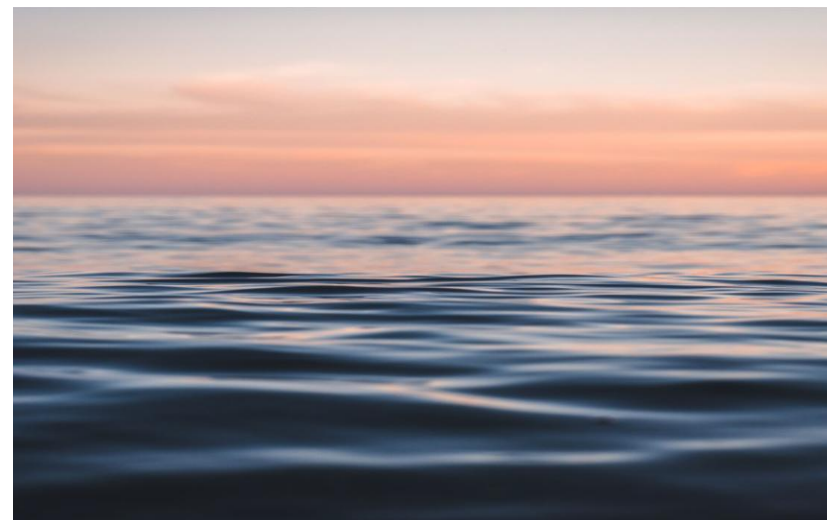
1. The Landscape: Understanding what to do in your environment
2. The Compass: Using the 3 C's of transition planning to plan
3. The Map: Navigating the recruitment process with the 4 P's
4. The Sail: Utilizing the Staff Transition Checklist for smoother sailing in the staff transition experience





- **The Landscape:**

- Understanding what to do in your environment



The Landscape: Understanding what to do in your environment

Let's describe your environment:

- Size of your co-op # of units/style of structure
- Status of your co-op
- Demographics of your membership
- Length of service of your staff
- Overall condition of your structure
- Any special considerations about your co-op & its function



The Landscape for Staff Transitions

Planned Transitions:

- Retirement
- Medical leaves
- Leave of absence
- Resignation with long-term notice

Unplanned Transitions:

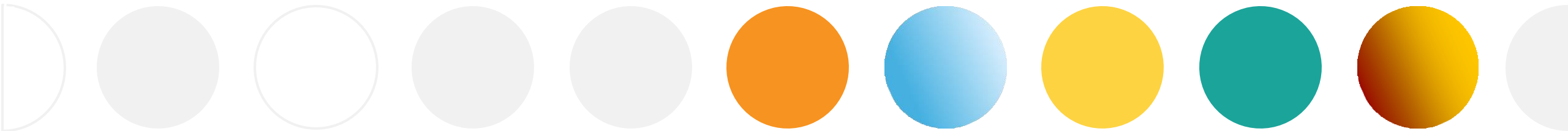
- Sick leaves
- Resignation with short-term notice
- Death of an employee
- Termination of employment

First Things First

Let's get started and take care of the most urgent things right now.

- Confirm Co-op Information Binder is complete and accessible and provided to lawyer as part of business continuity
 - Consult with local federation for information and guidance
 - Check bylaw considerations for changes of staff
 - Contact your legal representative or designated confidential information holder to access necessary information for the ongoing operations of your day-to-day co-op business.
- ○ Review contract for resignation/retirement notice requirements
 - ○ Determine timing of recruitment for role based on termination date
 - ○ Consider interim employment services and/or employment share with another organization
 - ○ Consider re-allocation of existing staff time and workload for temporary basis





■ The Compass:

- Using the 3 C's of transition planning to plan



The Compass: The 3 C's of moving through transitions

The three C's of any successful transition:

1. Communication
2. Co-operation
3. Collaboration



The Compass: The 3 C's of moving through transitions

Communication: providing necessary and important information to those who need it in times of transition

- What: what needs to be communicated?
- Who: who will craft the communication? Who sends it? Who receives it?
- When: when is the information shared?
- Where: where is the information shared? Which methods are used?



The Compass: The 3 C's of moving through transitions

Co-operation: working together in co-operation at the housing co-op

- Members
- Board directors
- Staff
- to support a unified path of action to move through the time of transition.



The Compass: The 3 C's of moving through transitions

Collaboration: connecting with all stakeholders

- At the co-op
- At the federation
- Among the suppliers and service providers
- to collaborate and partner to ensure continuity of operations at the housing co-op in a time of transition.



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Communication Strategy

By creating a communication strategy we consider who needs to know what and how they need to receive information.

- Determine who immediately needs to be notified internally & externally
- Internally: BOD, Personnel Representative, Membership, Property Management Company (when applicable), Regional Service Manager
- External: CRA, Co-op's Lawyer, Auditor, Insurance Company, Federations, Parties engaged and/or bound to the Co-op by contract eg: Utilities, contractors, engineers, etc., Service Manager/Regulator (if applicable), Financial Institutions
- Plan and send communications to stakeholders as appropriate



The Landscape of Staff Transitions

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The Map: Navigating the recruitment process with the 4 P's

The 4 priorities of ongoing co-op management can be categorized as:

- People
- Purpose
- Procedures
- Prosperity

Consider what is important about the recruitment process for you co-op in relation to these 4 priorities...



The Map: Navigating the recruitment process with the 4 P's

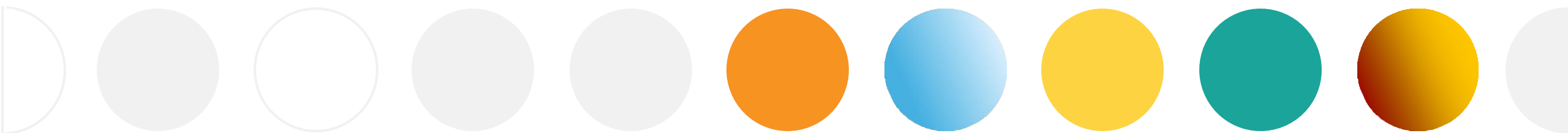


- 1. People:** all the individuals involved in/contributing to and impacted by a transition

The Map: Navigating the recruitment process with the 4 P's



- 2. Purpose:** the mission, vision, values and strategic plan that serves to support the foundation to the co-op's functions



■ The Map:

- Navigating the recruitment process with the 4 P's



The Map: Navigating the recruitment process with the 4 P's



- 3. Procedures:** the policies, procedures, rules, regulations, bylaws and guidelines that govern the activities of the daily operations

The Map: Navigating the recruitment process with the 4 P's



- 4. Prosperity:** the financial tracking, reporting, planning and sustainability that supports the ongoing functioning of the co-op

Recruitment Preparation

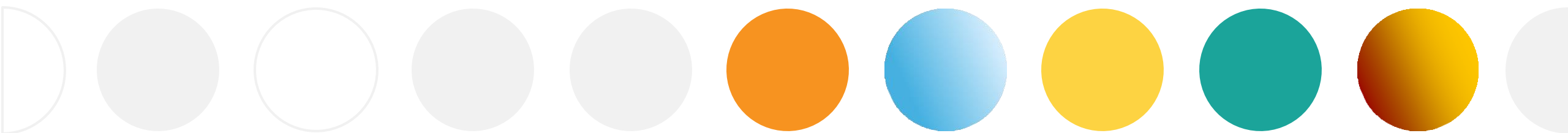
Let's prepare for the recruitment process with these activities to ensure that your co-op is ready to recruit its next staff member.

- Check property management contract to ensure proper notice given/received if applicable
- Establish a timeline for recruitment
- Assess the appropriateness and acceptability of direct hire vs. outsourced services
- Engage Recruitment/HR Consultant to facilitate recruitment process
- Review the needed and necessary skills/role description to update or create a job description
- Conduct a job pricing review to confirm salary scale

Recruitment Activity

The process of recruitment is straightforward once you or your consultant gets started.

- Prepare job ad to post in applicable locations
- Determine appropriate/eligible/interested internal candidates
- Create sub-committee in preparation for interviewing shortlisted candidates



The Sail:

Utilizing the Staff Transition Checklist for smoother sailing in the staff transition experience



The Staff Transition Process Checklist



The Sail: Utilizing the Staff Transition Checklist for smoother sailing in the staff transition experience

Housing Co-ops are complex organizations – think of your initial description of your particular co-op.

- Your staff need the tools to do their job well.
- What is most important in your co-op's consideration of choosing the best candidate for your staff position in the selection process?



Selection Process

Once you have completed the recruitment phase, it's time to consider who will be your next staff member.

- Work with Recruitment Consultant to select eligible candidates from applicant pool
- Recruitment Consultant conducts initial screening of candidates
- Consultant and sub-committee conducts first round interviews
- Review first round candidates to create shortlist
- Conduct final interview with shortlisted candidates to select final candidate
- Board agrees to selection of final candidate
- Design the job offer contract (with assistance from consultant and/or lawyer)
- Present the job offer to the designated candidate
- Once the offer is accepted, begin preparation for onboarding
- Communicate the upcoming change to stakeholder groups – internal/external



Onboarding

An intentional onboarding plan makes a big difference in the experience of a new staff member.

- Prepare a list of people and organizations for introductions to the new staff
- Create a 2 week agenda for the onboarding process including meetings, bank, passwords, and other signature obligations
- Prepare a 30 day knowledge transfer plan for the information and activities training by other staff and board for the new staff
- Introduce and refer to the Co-op Information Binder to update with any new information as a result of the hire



The Staff Transition Process Checklist



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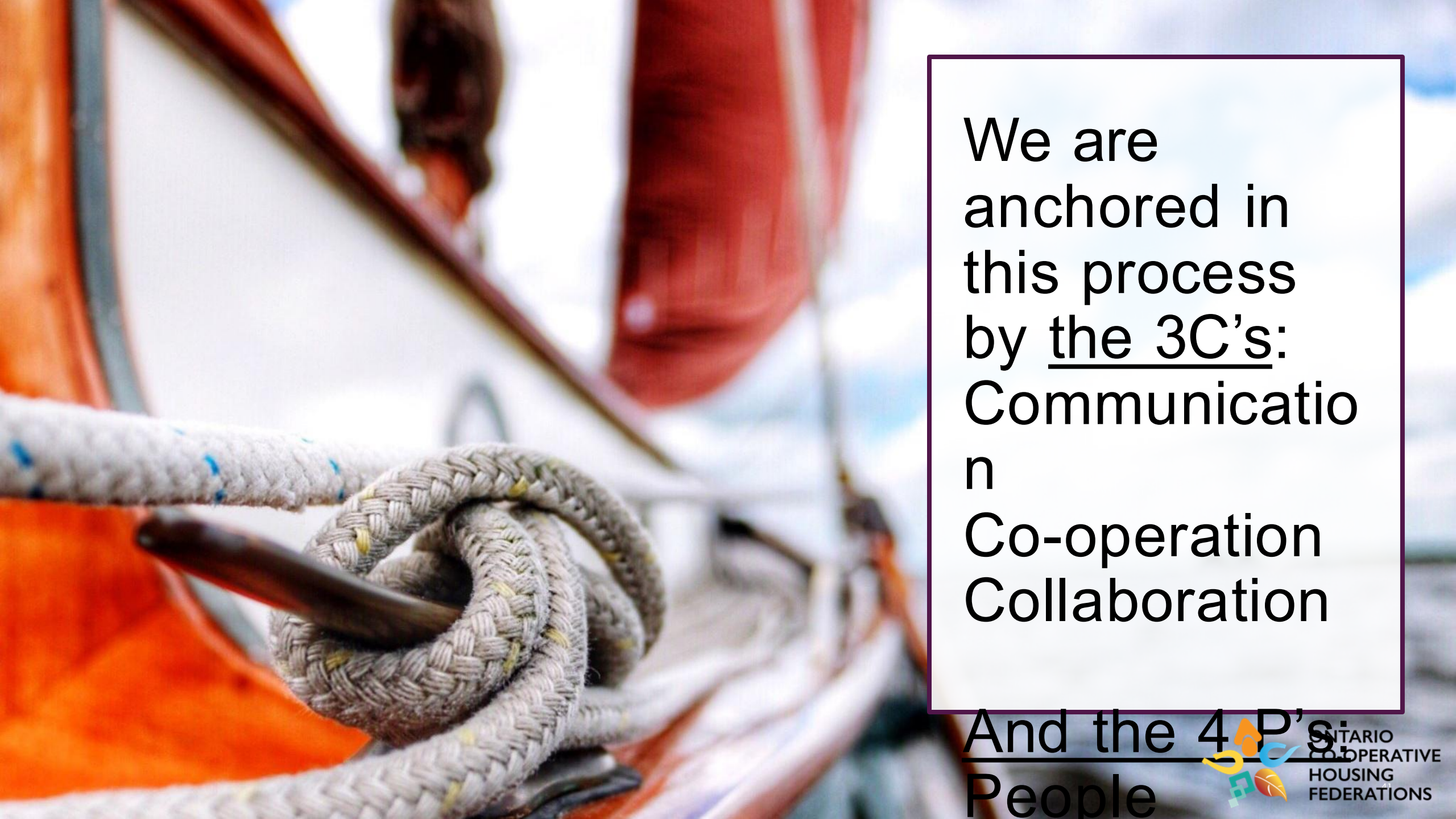


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A close-up photograph of a boat's deck. In the foreground, a thick, braided rope with blue and yellow accents is coiled around a dark wooden post. The background shows a red buoy and the white hull of the boat, with a blurred view of the sea and sky.

We are
anchored in
this process
by the 3C's:
Communication
Co-operation
Collaboration

And the 4 P's:
People



Takeaways from today's session

- Tip Sheet: Staff Transition Checklist
- Link to your “toolkit” - the Co-op Information Binder

Find these tools on the Peel-Halton website: www.phchf.com

“Programs” tab

- Resources & Links section
- Business Continuity Tools



The Toolkit: Your co-op information binder

- A well-equipped office - a computer, scanner, access to the Internet, a cloud-based backup system, or a schedule to perform regular daily backups of the computer's data to a secured digital storage device.
- Accounting software
- Procedures, rules, and policies
- You have all files at your fingertips, whether at the co-op or not.
- You will be able to search folders quickly.
- Templates and most used forms will be set up and easily accessible. There will be additional time and work to set up the system, but the rewards of organization are much more.



Co-op Information Binder

Thank you to the Co-op Managers, Property Management Companies and Federation Staff for your input and support.

INTRODUCTION

This file is designed to act as an electronic folder for co-op information. In the event of a staff change, having all the information about managing the co-op in one convenient and secure location is helpful. You can navigate the various topics and forms with the tabs at the bottom of the window.

Within the tabs of this binder, you will find information relating to the Board of Directors, membership, emergency procedures, policies, passwords and more.

Staff are encouraged to regularly update this file, protect its accessibility, and back up a copy for security and business continuity.

For more information about how to complete and manage the Co-op Information Binder, please contact the Peel Halton Co-operative Housing Federation (PHCHF) at info@phCHF.com.

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Share what you've learned on social media!

- Post photos, favourite moments, or key learnings from today's workshops on social media
- Tag us @chfcanada
- Use the hashtag #CHFCanada2026



The National Education Committee presents

ONLINE LEARNING

Self-Paced

Move through the content when it suits you.



Courses

Fulfilling your legal duties as a board director

Taking effective meeting minutes

Chair like a champion

Personal information protection

Identity affirming language

Maintenance 101

Financial statements 101

- ✔ For board directors, co-op members, and staff
- ✔ \$30 per course
- ✔ Many courses to choose from
- ✔ 30 minutes per course
- ✔ Requires internet connection
- ✔ Develop practical skills and gain knowledge



TAKE ACTION TODAY!

Youholdthekey.ca



**YOU HOLD
THE KEY**

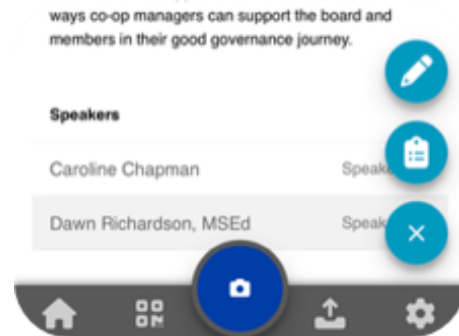
Protect affordable homes
Renew rental assistance now



Before you go

We need your help to do better!
Fill out a paper evaluation, fold in half and leave it in the room.
Or fill out a digital evaluation using our conference app.

Thanks!



When you get home

Find today's workshop materials in the resources section on our website:

chfcanada.coop/education/resources



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Reminders

- **Voting in CHF Canada National Business meeting happens on Saturday.** Your co-op's delegate must be there in order to vote. The delegate can pick up a voting device at conference services.
- **All coffee breaks will be held in the tradeshow area!** Make sure you visit all the tradeshow exhibitors so that you can complete the bingo card (found in your bag) and have a chance to win prizes.

