

WINNING WORKPLACES TOOL KITS

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This Tool Kit is designed to provide easy-to-implement, affordable ideas that help you enhance your workplace and make it a great place to work for employees. The Tool Kit is a step-by-step guideline to implement cost-effective programs. An organization that already has basic employee benefits such as health, dental, life and disability insurance, paid vacation, sick leave, and holidays is poised to become a Winning Workplaces™ organization and can enhance its workplace by using some of the concepts in this book.

The following Tool Kit is one of a 46-Tool Kit set. Each Tool Kit supports at least one of the six Building Blocks of a great workplace; most address several, since good practices result in multiple benefits that are difficult to isolate. When used together the Tool Kits will help you to enrich your workplace. A Tool Kit Grid (attached) outlines the relationships between the Tool Kits and the Building Blocks. The grid can also give you an idea of possible programs that would be most effective in your workplace and of the relative cost of implementing a particular Tool Kit.

Winning Workplaces has identified six fundamental Building Blocks of a great workplace: Trust, Respect & Fairness; Open Communications; Rewards & Recognition; Teamwork & Involvement; Learning & Development; and Work/Life Balance. Organizations that have built these elements into their culture are more productive and more profitable, are more likely to be resilient and adaptable, have better customer and employee retention rates, and know how to keep the organizational focus on achieving key business goals.

There are a number of ways to decide which Tool Kit(s) to use:

- Because the six Building Blocks work together to support a great workplace, you may wish to do an audit of the programs and policies that you already have in place to determine where your strengths and weaknesses are. Focus your investment in shoring up the weakest programs or policies based on the Building Blocks.
- You may want to know what your employees believe to be the organization's strengths and weaknesses before you begin to offer new programs. Winning Workplaces can help you gather that data through our Employee Survey or by conducting focus groups or interviews with your employees. Our survey is designed around the six Building Blocks, and the results can help you direct your actions and identify tool kits and programs that will be helpful to you.
- If, based on your audit or the employee survey, you want to enhance a particular Building Block, review all of the Tool Kits that support that Building Block and select one or two that would work best in your organization.
- If budget is a concern, you may want to start by considering the most affordable Tool Kits to implement. Any initiative can enrich your organization, but we recommend that you be mindful of the various Building Blocks that create a great workplace and develop programs that complement one another and support all six Building Blocks.
- You may use the Tool Kit descriptions to spur your own thinking and creativity. Find a program that either interests you, looks like a good idea, or has been

suggested by employees on our grid and then, modify or adapt it for your unique needs. Perhaps a Tool Kit will trigger an idea for another, related program that would work well in your organization.

No single program will change an organization's culture and no single Tool Kit will create a great workplace. Keep in mind that implementing any Tool Kit is likely to represent change in your organization, and change can be unsettling to some people. For this reason, even if offered with the best of intentions and commitment from leaders in the organization, a new program may not elicit the kind of employee reaction that you would hope for solely because it represents change.

Several elements of organizational behavior might be helpful as you consider introducing new programs:

- Because your organization is unique, any ideas need to be adapted to fit the organization, assuring that they support the existing strengths of your entity.
- Employees who participate in creating change are eager to assure its success. Because the programs suggested are supporting employees, engaging a group of employees to help determine priorities and develop implementation plans is an effective means of assuring that they will be well received.
- Even a handful of programs offered without the foundation of the core Building Block of Trust, Respect & Fairness will not support achieving your goals.

Finally, time is a critical element in building workplace culture. In direct contrast with the time requirements of the financial markets (i.e., short-term, expectations for quick results), organizations define themselves over periods of years. The payoff for implementing good workplace practices comes over time and to those who are patient. Investing in good workplace practices now is an investment in the future of your organization, and it will pay off in increased retention, productivity and profitability.

The Tool Kits were created by Winning Workplaces, a not-for-profit organization that provides information, training, ideas, consulting and these easy-to-use, affordable tools to help small and midsize organizations create great workplaces.

Winning Workplaces was founded by the Lehman family, part owners of Fel-Pro, a successful auto parts manufacturer that was a leader in developing innovative, employee-friendly workplace practices. Fel-Pro was ranked #4 in Fortune Magazine's list of the 100 Best Companies to Work For in 1998 and was honored by numerous industry awards for quality products and exemplary customer service. The business experience of our founders and evidence from other companies prove that effective workplace practices are better for employees and produce better business results.

Tool Kits

Program/Tool	Trust, Respect & Fairness *	Open Communications	Rewards & Recognition	Learning & Development	Teamwork & Involvement	Work/Life Balance	Cost to Company
Adoption Benefit						X	\$ to \$\$
Automotive Services Program						X	¢
Bulletin Boards, Signs & Graphics		X	X	X	X		¢ to \$
Chair Massage Program			X			X	¢ to \$
College Counseling Program				X		X	\$ to \$\$
Company Magazine		X	X	X	X		\$ to \$\$
Company Social Events					X	X	¢ to \$
Computer Financial Assistance Program				X		X	\$
Concierge Service						X	¢ to \$
Creating a Company Intranet		X					¢ to \$
Creating a Diverse Workplace Culture	X						¢
Departmental Lunches, Pizza Parties, Brown Bags & Quality Lunches		X	X	X	X		¢
Dependent Scholarship Program						X	\$ to \$\$
Educational Awards Program			X	X			\$
Eldercare Assistance Program						X	¢ to \$
Emergency Caregiver Program						X	¢ to \$
Employee Development & Job Training Program	X			X			\$ to \$\$
Employee Forum	X	X		X	X		¢
Employee Handbook	X	X			X		¢
Employee-Sponsored Community Support					X		¢ to \$
Financial Seminars				X		X	¢ to \$
Flexible & Seasonal Work Schedules	X					X	¢
Getting Started: Putting Basic Employee Benefits In Place			X			X	\$\$
Legal Counseling						X	\$
Matching Gifts Program					X	X	\$

Tool Kits

Program/Tool	Trust, Respect & Fairness *	Open Communications	Rewards & Recognition	Learning & Development	Teamwork & Involvement	Work/Life Balance	Cost to Company
Newborn / Adoption Gift						X	¢ to \$
Offsite Childcare Options	X					X	¢ to \$
Orientation & Welcome for New Employees		X		X	X		¢
Patent Awards			X	X	X		¢ to \$
Prenatal Counseling Program						X	\$
Quarterly Employee Meetings	X	X	X	X	X		¢
Recreation Area					X	X	\$ to \$\$\$
Retirement Planning & Counseling						X	¢
Safety Awards & Meetings	X	X	X	X	X		¢ to \$
Seasonal Gifts Program	X		X			X	\$
Service Awards	X		X				¢ to \$
Summer Day Camp						X	\$ to \$\$
Tax Preparation Program						X	\$
Time Off to Volunteer Program					X		¢ to \$
Transportation to Work Program						X	¢ to \$
Tuition Assistance				X		X	\$ to \$\$
Tutoring Services Program						X	\$
Vacation Purchase Program	X				X	X	¢
Volunteer Day					X	X	¢
Wedding Gift Program						X	¢ to \$
Wellness / Fitness Program					X	X	¢ to \$\$
Work Clothes Program					X	X	¢ to \$

* Trust, respect & fairness result from a combination of the other 5 elements so programs to improve your workplace in any of the other 5 areas will help you to build this important part of the workplace culture.

TAX PREPARATIONSM



WHAT is Tax Preparation Program?

A Tax Preparation Service allows qualified employees to use the services of a local tax preparation provider at the company's expense or subsidized by the company. This once-a-year benefit commonly entitles an employee to basic tax preparation (form 1040 or 1040EZ), with costs of any supplementary forms and/or schedules required to complete the filing remaining the employee's responsibility.

WHY have a Tax Preparation Program

Tax Preparation Services offer an affordable, reliable way for employees to complete and file their Federal and State income tax returns. For many individuals, negotiating their way through even the simplest of these forms is a challenge. Taxes that have been incorrectly filed or not filed at all can result in fines for the employee, wage garnishments and company involvement to complete the payback process, which can quickly become costly.

HOW do we facilitate a Tax Preparation Program?

Cost to Implement

While there is a direct out-of-pocket cost to the company for this service, it is a manageable cost. Local tax preparation providers, either local CPAs or H&R Block, Jackson Hewitt, etc., may be willing to give a group discount on their services. Many tax preparation agencies are willing to offer their services to corporate users at reduced rates. Rates can be negotiated on an estimated per capita use with the company paying only for employees who actually use the service. Employees can be asked to pay a portion of the fee to assure that they are aware of the value of the service.

Administration

Tax preparation certificates or coupons (see sample attached) are a good way to promote the program and assure that it is properly used by employees. They may be attached to paychecks or W-2s during the month of January. Coupons may be supplied by the tax preparer or furnished by the company. They should clearly state the limits of the benefit.

! *Attention:* Certificates and other literature regarding this program should specify clearly that the benefit is for basic tax preparation services only. Payment for all other forms and schedules beyond the basic 1040 income tax return are the responsibility of the employee.

Promotion

The Tax Preparation Service is a Work/Life benefit that can be promoted in all recruiting literature. During tax season the service should be promoted in employee newsletters, on the company intranet and on bulletin boards. Tax preparers sometimes provide large envelopes for holding receipts and tax-related documents with the locations of their offices printed on one side.

Payment

The tax preparer can collect any expected employee payment and invoice the company on a monthly basis with the number of employees who have used the service. The company then pays only for those employees who actually use the tax preparation service. Payment for all supplemental forms and schedules (itemized deductions, etc.) are the responsibility of the employee.

Note: The above instructions on facilitating a Tax Preparation Program are not all-inclusive in their scope. There are many ways to set up such a program. These are examples of how it has been done successfully by some companies and are intended as a guide only.

***Thank you** to Fel-Pro Incorporated for providing the model for this Tool Kit.*

TAX PREPARATION COUPONSM

(SAMPLE)

(FRONT OF COUPON)

**Group Tax
Employee Benefit
Tax Preparation
Certificate**

COMPANY _____
CITY _____
NAME _____
SOCIAL SECURITY NO. _____

...is hereby entitled to full income tax preparation service at participating (tax preparer's name) offices under the following conditions: Return must be for an individual, not a business, whether filing a single or joint return. Both Federal and State returns are included and all normal schedules that accompany them (see "Notice to Preparer" on the back of this certificate for those schedules or forms not included.) Service will be given any time during 2002 for returns for the year 2001. This certificate is not transferable.

REMEMBER – FILING DEADLINE IS APRIL 15, 2002

(Notice to Tax Preparer – See back side of this certificate for additional instructions.)

NOT TRANSFERABLE: This certificate cannot be used in conjunction with any other promotional offer.

(BACK OF COUPON)

NOTICE TO TAX PREPARER

Accept this certificate as full payment for Individual tax preparation for the employee of the company named hereon. The employee will pay an additional charge in accordance with (Preparer's) regular schedule of charges for each:

1. City or county return
2. Additional state return
3. Partnership return and related schedules
4. Corporation return and related schedules
5. Schedules, forms or statement related to a business or profession or farm income and expense
6. Statement of schedule pertaining to an Individual Retirement Account
7. Statement or schedule of rental income from two (2) or more rental properties
8. Electronic filing and refund anticipation loan fees

Origin:

Region _____
District Code _____
Code _____ / _____

Redeemed:

Region _____
District Code _____

(A) Portion of Fee Collected from Client _____ – New – Prior – Disclosure Statement Signed

(B) Total Charge of Return _____ – 1040 – 1040A – 1040EZ

Primary Social Security # _____