



Sample Team Handbook

A fillable workbook

A practical workbook for developing a lived experience team handbook. Use the prompts and work alongside team members to define your team's purpose and develop policies that support meaningful and equitable participation.

How to Use This Template

This template is intended to help new or existing long-term, employment-based lived experience teams develop policies, procedures, and guidelines that support their work. Inside, you will find prompts intended to help you identify the team's purpose, clarify roles and expectations, and draft policies that support equitable participation.

Develop it together

Work through the workbook with all relevant staff, especially those with lived experience. Before you start, consider how you intend to deal with disagreement, who has decision-making authority, and how you intend to compensate staff for their time.

Adapt it to your organization

Replace bracketed and italicized **RED** text with your own information. Use the included prompts to guide discussion. Add, remove, or reorganize sections to reflect your team's needs. Our organization ultimately made the decision to merge our lived experience staff handbook with our policies and procedures to form one comprehensive manual for all staff. You may find the following guide useful across multiple organizational settings.

Connect it to existing policies

Review relevant organizational policies and identify where the team needs additional clarity or where existing policy may need to be reassessed with equity in mind. Where an existing policy applies, summarize the key information.

Prepare your finished handbook

Remove instructional prompts, examples, and this page before sharing the completed handbook. Check that contact information, payment arrangements, and procedures are accurate. Update the table of contents and mark the date of the most recent update.

Keep it useful

Introduce the handbook during onboarding and make it available in formats that are accessible to your team. Revisit it with the team regularly and whenever roles, policies, or working arrangements change.

[Team Name] Handbook

Last updated: [Month/Year]

Welcome to **[Organization Name]**!

[Write a short introduction about your organization's mission and culture.]

Example:

"We are dedicated to [mission/goal]. Our team works collaboratively to achieve [vision]. We value [values or principles] and are glad to have you join us."

If you have any questions about this handbook, please contact:

[Supervisor/Lead's Name and Title]

[Email Address]

[Phone Number]

Table of Contents

[Adjust this list to reflect your team's ideal handbook]

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[Organization Name]

[Address]
[Phone number]
[Email]
[Website]

About [Organization Name]

[Include a brief description of your organization here]

Mission:

[Insert your organization's mission statement.]

Values:

[List 3–5 core values with short explanations.]

Example:

“Equity: We centre those most affected by our work and collaborate on solutions.”]

Team Directory:

- Executive Director / Leader: _____, Email: _____
- Other Key Staff: _____, Email: _____

Board of Directors (if applicable):

- Chair: _____, Email: _____
- Other Members: _____, Email: _____

Team Overview

[Insert Team Name]

About

[Clearly explain why the team exists and what it does.]

Prompts for discussion:

- *What is the main purpose of the team? (Example: providing expertise, lived experience insight, policy guidance)*
- *Who does the team serve or support? (Example: the organization, community members, partner agencies)*
- *What are the main goals or outcomes you want the team to achieve?*
- *How does this team complement or collaborate with other parts of the organization?]*

Development

[Explain the origins of the team and why it was created.]

Prompts for discussion:

- *What led to the creation of this team? (Example: identified gap, community need, organizational strategy)*
- *Who was involved in forming the team? (Example: staff, leadership)*
- *What was the process for establishing the team? (Example: consultation, co-design, pilot project, environmental scan)]*

Guiding Principles

[State the foundational values and practices that guide the team's work.]

Prompts for discussion:

- *What principles are most important for how the team operates? (Examples: being trauma-informed, co-design, equity, etc)*
- *How do these principles influence the work you do and decisions you make?]*

Policies

Confidentiality

Purpose: Protect the privacy and trust of team members, participants, and organizational information.

[Prompts for discussion:

- *What types of information are considered confidential? (e.g., personal experiences, health information, internal discussions, partner agency data)*
- *How long does confidentiality apply? (e.g., during and after participation/employment)]*

Background / Criminal Record Check

Purpose: Help ensure safety while reducing barriers to participation.

[Prompts for discussion:

- *Are background or criminal record checks required? If yes, explain why. Specify the type (e.g., Vulnerable Sector Check, Police Record Check).*
- *Who covers the cost of these checks?*
- *Will you accommodate individuals with past convictions?]*

Roles and Decision-Making Authority

Purpose: Clarify team members' responsibilities and how their work influences the organization.

[Prompts for discussion:

- *What are the team's main responsibilities, and what falls outside its role?*
- *Who supervises the team, and how does it work with other staff and leadership?*
- *Which decisions can team members make independently, which are shared, and which require supervisory approval?*
- *How are different staff involved in the creation of work plans?*
- *How can team members raise concerns about responsibilities, workload, or limits on their influence?]*

Reviews & Feedback

Purpose: Support professional growth, provide recognition, and create open communication channels.

[Prompts for discussion:

- *How often will feedback be provided to team members? (e.g., monthly, quarterly)*
- *How can team members safely give feedback to supervisors or the organization?]*

Payment / Compensation

Purpose: Ensure transparency and clarity in compensation for work done.

[Prompts for discussion:

- *What is the hourly rate of pay?*
- *What are the expected hours? Are they flexible?*
- *Are there policies for overtime or administrative work?*
- *How are cancelled meetings or changes in schedule handled?*
- *How and when will payments be issued?]*

Leave / Absences

Purpose: Clarify to team members how they can request time off.

[Prompts for discussion:

- *What types of leave are available? (sick, personal, vacation, emergency)*
- *How should leave be requested? (e.g., written request, email, form)*
- *How much notice is required?*
- *Who approves leave requests?]*

Discrimination & Harassment

Purpose: Ensure a safe, inclusive, and respectful environment for everyone.

[Prompts for discussion:

- *Define discrimination (e.g., unfair treatment based on race, gender, disability, lived experience).*
- *Define harassment (e.g., offensive comments, intimidation, bullying).*
- *Describe the organization's zero-tolerance policy.]*

Complaint Procedure

Purpose: Provide a clear, safe, and fair process for resolving conflicts or concerns.

[Prompts for discussion:

- *How should a complaint be submitted? (verbally, in writing, etc.)*
- *Who is the first point of contact?*
- *What are the steps for resolution?*
- *What is the expected timeline for response?*
- *How is confidentiality maintained?]*

Code of Conduct

Purpose: Set behavioural expectations to maintain a healthy, respectful, and productive team environment.

[Prompts for discussion:

- *What are the expectations of team members? (e.g. respect, collaboration, inclusivity etc)*
- *What accountability measures are in place for repeated violations?]*

Dismissal / Resignation

Purpose: Provide clarity on voluntary and involuntary exits.

[Prompts for discussion:

- *How can a team member resign? (e.g., written notice, notice period)*
- *Under what circumstances may a member be dismissed? (e.g., breach of policy, safety concerns)*
- *Who makes the final decision?*
- *What process will be followed for dismissals?]*

Social Media / Public Communication Guidelines

Purpose: Protect the organization while empowering team members to share expertise safely.

[Prompts for discussion:

- *Clarify personal vs. professional accounts.*
- *Guidance on sharing organizational information.*
- *Recommendations for tone, accessibility, inclusivity, and disclaimers.*
- *Steps to take if facing harassment or negative feedback online.]*

Accessibility and Supports

Purpose: Ensure team members can access the supports and working arrangements they need to participate equitably.

[Prompts for discussion:

- *How can team members request accommodations or changes to their working arrangements?*
- *Can materials and technological tools be made available?*
- *What information is needed to arrange support, and how will personal information be protected?*
- *How can team members revisit arrangements when their needs change?]*

Privacy, Identity and Disclosures

Purpose: Protect team members' control over their personal experiences and support informed decisions about sharing them.

[Prompts for discussion:

- *Are staff required to qualify or justify the source of their lived expertise?*

- *How will expectations about personal disclosure be discussed when assigning work? (For example: If a request comes in for the team to evaluate a substance-use related program, how will the team balance privacy with the need to prioritize and amplify the voices of substance users?)*
- *Can team members always decline questions, set boundaries, or stop sharing without penalty?*
- *How will consent be obtained before using a member's story, name, photograph, or recording? What information should be made available to ensure informed consent?*
- *If the organization publishes content related to team members (social media images, blogs, etc.), will members be able to review and approve materials before release?*
- *How can members revoke or alter their consent? What limits may impede their ability to do so?]*

Supervision, Support and Development

Purpose: Provide consistent supervision, adequate support, and opportunities for professional development and mobility.

[Prompts for discussion:

- Who provides supervision, and how often will individual and team check-ins take place?
- How can team members request support between scheduled meetings?
- What kind of preparation and debriefing opportunities are made available?
- How can members request a break or additional support if work becomes difficult?
- How will supervisors respect boundaries between workplace support and members' private lives?
- How does leadership intend to promote a supportive working relationship rather than a therapeutic relationship?
- Are paid training opportunities available? How will new staff be onboarded?
- How will members' skills, interests, and career goals inform opportunities for advancement?
- Is there any opportunity for upward mobility within the organization?]

Expenses and Equipment

Purpose: Ensure team members have the resources needed to do their work without absorbing personal costs.

[Prompts for discussion:

- *What work-related expenses are covered? Consider transportation, meals, travel, technology, and other essential participation costs.*
- *Which expenses require advance approval, and who provides it?*
- *What options are available when members cannot pay expenses upfront?*
- *How are reimbursement requests submitted, what documentation is needed, and how will payment be made?*
- *Are members expected to use personal devices or accounts? Are any alternatives or privacy protections available?*
- *How will loaned equipment be returned when a member leaves?*
- *Is there a budget for local travel costs? Out-of-town travel costs? Family care costs? Are meals covered during group gatherings with food served?]*

Other

[These are just examples of policies that are helpful to include. Your organization may have other policies that need to be highlighted. Expand upon them here.]

How to Review and Update This Handbook

A useful handbook is an accurate and accessible handbook. This guide will need to be revisited regularly, with extra attention during periods of change and growth. Consider the following:

- How often will the handbook be reviewed, and who will coordinate the review?
- How will team members participate in reviewing policies and proposing changes?
- Can members suggest improvements between scheduled reviews?
- Who has the final say on proposed changes, and how will disagreements be addressed?
- How will updates be communicated, and where can members find the current version?

Last reviewed: [Month/Year]

Next planned review: [Month/Year]

Contact for questions or suggested changes: [Name/Role and contact information]