Reduce Your HR Worries and Woes: HR Strategy & Best Practices for Growing Organizations

Katie Magoon
Founder and President
People Solutions Center

January 26th
10:00-11:30am Pacific
Overview of BUILDing for Growth's Three-tiered approach

1. **Communities of Practice**
   - Learn from and with other nonprofit leaders from high growth organizations by problem solving real world challenges with peers in similar roles

2. **Virtual Workshops**
   - Engage in monthly interactive workshops (open to all staff and board) to delve deeper into understanding and addressing high-growth needs

3. **Targeted Consulting**
   - Access to individualized services from La Piana Consulting

Program delivery: October 2021-June 2022
# Overall Identified Challenges

<table>
<thead>
<tr>
<th>STAFF</th>
<th>SYSTEMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Naming and prioritizing needs</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Communication</td>
<td>Organizational Structure &amp; Mid-Level Management</td>
</tr>
<tr>
<td>Organizational Culture</td>
<td>Facilities &amp; COVID response</td>
</tr>
<tr>
<td>Skills &amp; Development</td>
<td>Operations &amp; Systems</td>
</tr>
<tr>
<td>Executive Leadership &amp; Decision-Making</td>
<td>Information Technology</td>
</tr>
<tr>
<td>Leadership Transitions</td>
<td>Fund Development, Management &amp; Long-Term Financial Stability</td>
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</tbody>
</table>
Workshop Learning Goals

By the end of this workshop, you will have learned a practical approach to developing and implementing an HR strategy that ensures:

- Compliance with state, federal and local laws
- Strong HR processes, policies and practices for recruitment, development, engagement and teamwork
- HR structure options to meet the needs of your growing organization
- Diversity, Equity and Inclusion efforts align with your organizational culture
What do you do well?

What are your goals?

• Compliance

Where do you need to improve?

What obstacles do you face?

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS
Which area is your greatest challenge?

- Compliance
- Recruiting
- Employee development
- Diversity, Equity & Inclusion
- Turnover
HR Excellence

Foundational HR Practices

DIVERSITY of people, perspectives
EQUITY in policy, practice & position
INCLUSION via power, voice & organizational culture
JUSTICE with equal rights & equitable opportunities
## Sample Compliance Checklist

<table>
<thead>
<tr>
<th></th>
<th>![Checkmark]</th>
<th>![Checkmark]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you have an employee handbook that was reviewed in the past 18 months? COVID-19 appendix?</td>
<td>Have you posted the required Federal and state employment posters?</td>
<td></td>
</tr>
<tr>
<td>Do you have current job descriptions?</td>
<td>Have you completed Harassment training?</td>
<td></td>
</tr>
<tr>
<td>Are the FLSA exemptions accurately applied? Do you have timecard records?</td>
<td>Do I-9 forms exist? Are they completed accurately? Are they stored outside of the employee file?</td>
<td></td>
</tr>
<tr>
<td><strong>Sample Compliance Checklist</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are background check policies FCRA compliant?</td>
<td>Do you have clear worker’s compensation policies and guidelines?</td>
<td></td>
</tr>
<tr>
<td>Are you compliant with OSHA?</td>
<td>Are you compliant with FMLA? (50+ employees)</td>
<td></td>
</tr>
<tr>
<td>Are your employee files compliant?</td>
<td>Are you compliant with COBRA and ACA laws? (20+ employees)</td>
<td></td>
</tr>
<tr>
<td>Are you appropriate classifying 1099 v W-2?</td>
<td>Do your interviews or applications include any illegal questions?</td>
<td></td>
</tr>
</tbody>
</table>
### COVID-19 Compliance?

<table>
<thead>
<tr>
<th></th>
<th>![Green Checkmark]</th>
<th>![Green Checkmark]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you have a plan if an employee is exposed or tests positive?</td>
<td>Have you updated your handbook for COVID-19?</td>
<td>Are you tracking vaccination status?</td>
</tr>
<tr>
<td></td>
<td>• PTO</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Telecommute</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Social distancing outside of work</td>
<td></td>
</tr>
</tbody>
</table>
Job Description Benefits:

Increase engagement & productivity:
- Sets clear expectations
- Serves as a coaching tool

Reduce legal risks:
- Workers’ Compensation
- Family Medical Leave
- Americans’ with Disabilities Act
- Fair Labor Standards exemptions
Job title
Job duties
Required qualifications
Work environment
Disclaimer & signature
Job Description Best Practices:

- Client relations: 60%
- Leading team members: 20%
- Completing QA: 10%
- Updating systems: 10%
Employee Handbook Benefits:

- State law
- Local law
- Federal law
- OSHA regulations
Employee Handbook Best Practices:

- Limit “legal speak”
- Acknowledgement
  - “Understand I am responsible…” NOT
  - “I have read and understand….”
- Review with employees in-person
  - New hires
  - New or changes to policy
On a scale of 1 to 10, how are you feeling about compliance issues?

(10 – We are in really good shape!)

• 1 – 3 We have a long way to go!
• 4 – 6 We have some pieces right, but still have work to do!
• 7-10 We are in relative good shape!
Foundational HR Practices
Employee Lifecycle Process

SWOT Analysis

Pre-Employment
- Employment Branding
- Workforce Management Planning
- Recruiting

Employment
- Onboarding
- Development
- Engagement
- Performance Management

Offboarding
- Exit Management
Which part of the employment process is your greatest area of opportunity?

- Candidate experience
- Onboarding
- Development
- Performance Management
- Engagement
- Exit process
## Employee Life-Cycle Management Review

### Workforce planning:

- Is there a plan for # of hires by job title?
- Do you have historic information on turnover?
- Do you know growth projections?
- Do you have a succession plan for key roles?
## Employee Life-Cycle Management Review

### Employment Branding & Recruiting:

- Do you have strong sourcing plans?
- Do you have a well-defined selection process?
- Do you have interview guides?
- Are your interviewers trained in behavioral interviewing?
- Do you have a positive candidate experience?
Hiring Process Benefits:

- Improve quality of hire
- Reduce time to fill
- Limit legal risks
- Set expectations for company culture
Hiring Process Best Practices:

- Post a Job Ad vs. Job Description

- Define competencies, skills and motivations
  - Customer focused
  - Ability to solve problems
  - Ability to handle stress
Motivational Fit:

- Like
- Dislike
- Never
- A lot
Hiring Process Best Practices:

- Create interview guides
  - “Tell me about a time....”

- Train interviewers

- Comply with Fair Credit Reporting Act
## Employee Life-Cycle Management Review

<table>
<thead>
<tr>
<th>Process</th>
<th>S</th>
<th>W</th>
<th>O</th>
<th>T</th>
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<tbody>
<tr>
<td><strong>Onboarding:</strong></td>
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<tr>
<td>• Do you have a consistent process for onboarding new hires across their first 6 months?</td>
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<tr>
<td>• Are roles and responsibilities well-defined?</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>• How are you tracking this delivery?</td>
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</tbody>
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Employee Life-Cycle Management Review

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<tbody>
<tr>
<td>Development &amp; Performance Management:</td>
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<tr>
<td>• Do you have appropriate coaching tools in place?</td>
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<tr>
<td>• Do your employees have individual development plans?</td>
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<tr>
<td>• Is there a consistent process for managing poor performers?</td>
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</table>
Performance Management Best Practices:

- Leverage coaching conversations
  - Focus on the conversation
  - Increase frequency
  - Focus on the future
  - Start/Stop/Continue
Employee Life-Cycle Management Review

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<tr>
<td><strong>Compensation Practices:</strong></td>
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<tr>
<td>• Do you have a consistent process for setting</td>
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<tr>
<td>and reviewing compensation?</td>
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<tr>
<td>• Do employees understand your compensation</td>
<td></td>
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<tr>
<td>philosophy and practices?</td>
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<tr>
<td>• Do you offer a competitive benefits plan?</td>
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</table>
### Employee Life-Cycle Management Review

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<th>T</th>
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<tbody>
<tr>
<td><strong>Exit Interviews:</strong></td>
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<tr>
<td>- Do you have a formal exit interview process?</td>
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<tr>
<td><strong>HR Technology</strong></td>
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<tr>
<td>- Do you have an HRIS system to support your HR processes and record keeping?</td>
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</tbody>
</table>
Which part of the employment process is your greatest strength?

- Candidate experience
- Onboarding
- Development
- Performance Management
- Engagement
- Exit process
HR Excellence
HR Excellence Strategies:

• Align with business initiatives
• Solve business challenges
• Improve employee retention
• Increase employee engagement & results
• Impact the bottom line
HR Excellence Strategies:

- Employee engagement surveys and strategies
- Leadership assessments & development
- Workplace Styles training
- Remote workforce strategies
- R.A.C.I.
<table>
<thead>
<tr>
<th>R</th>
<th>Responsible — Person working on activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Accountable — Person with decision authority</td>
</tr>
<tr>
<td>C</td>
<td>Consult — Key stakeholder who should be included in decision or work activity</td>
</tr>
<tr>
<td>I</td>
<td>Inform — Needs to know of decision or action</td>
</tr>
</tbody>
</table>
Iceberg Model

- Race
- Ethnicity
- Gender
- Age
- Physical Abilities/Qualities
- Sexual Orientation
- Parental Status
- Native born/non native
- Beliefs
- Values
- Military Experience
- Work Background
- Thinking Styles
- Religious Beliefs
- Culture
- Smoker/Non smoker
- Geographic Location
- Education
- Socio-economic Status
- Functional Specialty
- Marital Status
1) What is on the floor at the foot of the bed?

2) What two items are on the dresser at the foot of the bed?

3) What is on the floor in front of the window?

4) What two items are on the bed?
Implicit or **unconscious bias** happens by our brains making incredibly quick judgments and assessments of people and situations without us realizing.
We make 11 judgements

In the first 7 seconds
## Building the Plan:
### Step 1: Prioritize the projects

<table>
<thead>
<tr>
<th>Complete in 1-6 months</th>
<th>Short-term goals (6-18 months)</th>
<th>Long-term goals (18 months – 3 years)</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Compliance requirement</td>
<td>✓ Foundational processes</td>
<td>✓ Require foundational tools be completed</td>
</tr>
<tr>
<td>✓ Quick win</td>
<td>✓ Require additional resources</td>
<td>✓ Require considerable resources, consultation or change management</td>
</tr>
<tr>
<td>✓ Limited resources needed</td>
<td>✓ Require considerable consultation or change management</td>
<td></td>
</tr>
</tbody>
</table>
### Building the Plan:

**Step 2: Identify the appropriate resources**

<table>
<thead>
<tr>
<th>In-house</th>
<th>External vendor</th>
</tr>
</thead>
</table>
| - Resources & knowledge exist in-house  
  - Internal knowledge brings subject matter expertise | - Resource constraints exist  
  - In-house team better leveraged on other projects  
  - Benefits gained from faster delivery  
  - External vendor brings subject matter expertise  
  - Employee trust increased by “safety” of 3rd party vendor |
People Solutions Center

Katie Magoon
(314) 308-3224

hr@peoplesolutionscenter.com

www.peoplesolutionscenter.com
Special Offer

Text HRINFO to 72345

Free HR Strategy session (value $700)
Questions?
Zoom Poll: Exit Questions
Next Workshop Details

Scaling organizational and leadership structure in a fast growth environment

- Thursday, February 24, 2022 12:00 PM-1:30 PM CST