Human Resources

WEBINAR SPONSORED THROUGH THE CDFI FUND CAPACITY BUILDING INITIATIVE
NeighborWorks® America
NeighborWorks® America (NeighborWorks®) is a national nonprofit organization chartered by Congress in 1978. Its mission is to create opportunities for Americans to live in affordable homes, improve their lives, and strengthen their communities. NeighborWorks® has over 25 years of experience providing training and is recognized as the premier provider of training in the affordable housing and community development industry.

Seven Sisters Community Development Group, LLC
Seven Sisters Community Development Group, LLC is a woman- and majority Native American-owned national consulting firm, which offers culturally relevant and innovative strategies, services, and products that create systemic change. Its team of community development experts works with low-wealth and diverse communities across the country, with a particular focus on Native Communities. The team brings a broad range of experience with tribal governments and communities as well as national and local nonprofits, foundations, corporate organizations, and governmental entities.

Shannon Mick, MBA, CCP, will be the Trainer/Facilitator. As Senior Consultant she has been involved with all Human Resources projects and training since starting with Valliant 2006. Previous to working with Valliant Shannon’s experience include designing the strategic vision, development and direction of human resources and compensation for Presbyterian Healthcare Services. At the University of New Mexico, she was responsible for the design, development and implementation of a new market-based classification system for all staff employees. Valliant’s approach is to structure the webinar so that new skills and ideas are presented in a relaxed environment. It is designed to be interactive with much discussion facilitated by the trainer.
A Little Bit About Me...

- Valliant Consulting
  - Native-owned organization
- Focus on native organizations and enterprises around the county
- Shannon Mick, Senior Consultant
- MBA Executive Leadership, BA Human Resources, CCP
- Senior Executive 20+ Years in Human Resources and Management
A Little Bit About You...

Share with the group:
- Name, Title
- Organization
- Biggest HR challenge

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A Little Bit About You From Survey...

- 8 CDFI’s Participated

**Diagram:**

- **Yes:** 75.0%
- **No:** 25.0%

**Question:** Does your CDFI have a staff person dedicated to working through human resources issues?

**Statistics:**

- 25.0% Yes
- 75.0% No
Agenda Overview

• What is HR?
• Performance Management
• Training & Development
• Staffing
• Employee Handbook
• Compensation
• Job Descriptions
Historic Roles of HR

Advisory
- Assist line management with HR Functions

Services
- Assist organization, its employees and the public

Control
- Policies
- Procedures
Current HR Roles

Strategic
- Global, long-term perspective
- Focuses on building the right culture and organization

Operational
- Day-to-Day perspective
- Focuses on running the organization

Administrative
- Focuses on compliance issues and record keeping

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What do you think are the important activities in a good Human Resource program?

- Raise your hand or type in the chat box
Major Activities of HR

HR
- Planning & Analysis
- Staffing
- Compensation & Benefits
- Training & Development
- Performance Management
- Employee Relations

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Top HR Issues

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Is Performance Management more than just the annual review in your organization?

- Yes
- No
Performance Management Model

Planning Performance

Reward Performance

Coaching Performance

Performance Appraisal

Improve Performance

Review Performance

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## Continuous Feedback/Coaching vs. Performance Appraisal

<table>
<thead>
<tr>
<th>Feedback</th>
<th>Appraisal</th>
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<tbody>
<tr>
<td>Provides information</td>
<td>Provides an annual evaluation</td>
</tr>
<tr>
<td>Immediate, ongoing activity</td>
<td>Retrospective and event-based; usually occurs at designated intervals and is often linked to pay or other rewards</td>
</tr>
<tr>
<td>Usually verbal</td>
<td>Written</td>
</tr>
<tr>
<td>Perceived as neutral</td>
<td>May cause fear and other emotional reactions</td>
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</tbody>
</table>

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Types of Appraisals

Self Evaluation

Traditional
- Supervisor
- Employee

Multi Rater
- Self
- Supervisor
- Customer
- Peers
- Employee

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No Surprises
Do you utilize an Employee Development Plan for employees?

- Yes
- No
Create Employee Development Plan

- Training needs
- Prepare for new position
- Correct any issues or problems
- Monitor throughout the year
Staffing Poll

Do you hire?
- A players
- Best of the Pool
- Warm Body
Three Prong Staffing Approach

- Recruitment
- Selection
- Retention

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Staffing

Spend time on the FRONT end in the selection process, or on the BACK end with a wrong hire.
If in doubt

Walk away!!!

Don’t hire someone when your gut says something is not right
Retention

- Don’t neglect once hired
- Provide orientation
- Check in to ensure success
- Create welcome environment
Orientation/Onboarding

- First impressions
- Immediate
- Ongoing
Do you currently have an employee handbook?

- Yes: 75.0%
- No: 25.0%

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Components of Handbook

Payroll
- Timekeeping
- Paydays
- Advances
- Deductions
- Pay Corrections

Working Conditions
- Schedules
- Smoking
- Overtime
- Break & Meal Periods
- Emergency Closing
- Computers
- Email Usage
- Social Media

Employee Conduct
- Employee Conduct
- Corrective Action
- Drug & Alcohol Use
- Harassment
- Attendance & Punctuality
- Dress Code

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Policy Poll

- Do you policies match your practices?
  - Yes
  - No
Compensation System

- Direct Pay
- Indirect Pay
- Incentives
Compensation Programs

- **Survey**

  *Do you set employees salaries using:*

  - Market pricing: 57.1%
  - Point value/Internal value: 14.3%
  - Incentive pay or bonus plans: 28.6%
Job Descriptions

- 100% of you use job descriptions
- Should not be a “laundry list” of ALL duties
### National CDFI Market Data

<table>
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<tr>
<th>Data Cut</th>
<th>Base Market Pay</th>
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<td>CEO</td>
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<tr>
<td>Under 5.8 Million</td>
<td>$85,000</td>
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<tr>
<td>0-5 Employees</td>
<td>$88,100</td>
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<td>5.1-10 Employees</td>
<td>$100,000</td>
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<tr>
<td>Rural Area</td>
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<tr>
<td>Loan Officer</td>
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<tr>
<td>Under 5.8 Million</td>
<td>$36,000</td>
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<tr>
<td>0-5 Employees</td>
<td>$36,000</td>
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<tr>
<td>5.1-10 Employees</td>
<td>$49,000</td>
</tr>
<tr>
<td>Rural Area</td>
<td>$50,000</td>
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Compensation Poll

Is your salary for the CEO/Executive Director and Loan Officer aligned with the market rate?

- Yes
- No
Human Resources

- Spend time proactively
- Communicate, Communicate, Communicate
- When all areas are in alignment
  - HR is proactive
  - Better workplace environment
  - Lower Turnover
  - Higher employee engagement
  - Allows you to focus on 80% rather than the 20%
Questions