

HANNA RESOURCE GROUP

presents

HR 10 1: Basic HR for Non-HR Managers





Allison Pettrey
Director
of HR Outsourcing

As Director of HR Outsourcing for HRG, Allison both serves in the lead HR role for a number of organizations throughout the Bluegrass as well as supports other consultants and partners performing outsourcing work for our clients. Allison has worked with multiple industries including equine, technology, creative agencies, medical practices, and non-profits.

Prior to joining HRG, Allison obtained 5 years of hands-on experience serving as the General Manager of a non-profit organization in Georgetown, Kentucky. Allison has obtained her Professional in Human Resources (PHR) Certification and her SHRM Certified Professional (SHRM-CP) designation, serves on the HR Committee of a local women's organization, and she serves on the Bluegrass Compensation Association board as a Public Relations and Branding Co-Chair.

Having studied at Oxford University and graduated from Georgetown College, Allison has her bachelor's degree in English with an emphasis on creative writing and is responsible for everything from compensation program design to crafting communications, policies, and procedures in order to facilitate the success of new or updated programs.

Allison handles all HR functions including recruiting, employee relations, benefits administration, compensation program design, writing/interpreting job descriptions, compliance issues, and creating and delivering internal and/or external communications.

PURPOSE & AGENDA

To empower managers to feel confident handling basic HR-related issues!



COMPLIANCE &
REGULATIONS



RECRUITING &
ONBOARDING



PERFORMANCE
MANAGEMENT



WORKPLACE ISSUES &
CONFLICT RESOLUTION



HR RESOURCES &
ADDTL SUPPORT

Compliance

HANNA RESOURCE GROUP

Compliance Checklist



Form I -9



At-Will Employment



KY Pregnant Workers Act (no size limit); ADA - For employers with 15+ employees



COBRA - For employers with 20+ employees (State Continuation if Less)



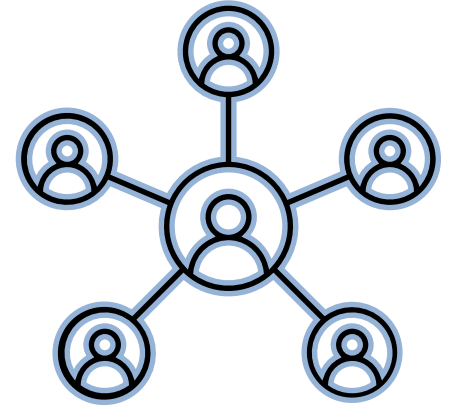
ACA - For employers with 50+ employees, FMLA - For employers with 50+ employees

Understanding FLSA



	Description	Manager's Role
Exempt Employees	<ul style="list-style-type: none"> • Not entitled to overtime pay and are generally salaried employees with specific job duties. • Must meet certain criteria related to salary level, salary basis, and job duties. 	<ul style="list-style-type: none"> • Managers need to correctly classify employees as exempt or non-exempt. • Ensure exempt employees meet the salary and job duties criteria outlines by FLSA.
Non-Exempt Employees	<ul style="list-style-type: none"> • Eligible for overtime pay for hours worked beyond 40 in a workweek. • Typically paid on an hourly basis. 	<ul style="list-style-type: none"> • Track non-exempt employees' hours accurately. • Pay overtime rates for any hours worked beyond the standard 40 hours per week.
Recordkeeping	<ul style="list-style-type: none"> • FLSA mandates that employers maintain accurate records of employees' hours worked, wages paid, and other employment-related information. 	<ul style="list-style-type: none"> • Managers must ensure that accurate records are maintained within their teams. • Collaborate with HR to establish effective recordkeeping processes.

Confidentiality



Clearly familiar with HIPAA in your industry – however, there are other confidentiality considerations for managers regarding the general workforce.

What pieces of information are considered confidential?

- I. Personal information (names, addresses, contact details, and so on)
- II. Management information (employee relations, disciplinary actions, impending layoffs, workplace investigations)
- III. Employee health information

Note: Some types of information are protected by law.

Performance Management



HANNA RESOURCE GROUP



Providing **FAST,** **EFFECTIVE** Feedback:

- **FREQUENT (AND BALANCED!)**

- Often
- Don't only focus on what a person needs to do better – acknowledge wins, too!
- Don't only give positive feedback, either – you're missing opportunities to help people become even more successful.

- **ACTIONABLE**

- Make the goals or feedback **measurable**. What does success look like?

- **SPECIFIC**

- Details, details, details!

- **TIMELY**

- Timely **positive** feedback strongly reinforces positive actions and results
- Timely **developmental** feedback provides suggestions soon enough for people to adjust and enhance their performance

Be Mindful of...

CONFIDENTIALITY

Do not talk to other employees about another employee's performance, discipline, etc.

CONSISTENCY

Ensure that all employees who are having the same performance challenges are being addressed similarly.

AREAS OF CONCERN

Are they giving a reason for the performance issues that is related to a disability or medical condition?

DOCUMENTATION

Verbal discussions are fine but when something becomes a pattern, document, document, document!!

Discipline/Issue/Support Chart

Issue	Outcome Desired	Response	Sample Content	When	Who Involved	Note
1st time offense, small process/policy/behavior issue, or small area for performance improvement	Make employee aware	Informal discussion with employee	_____ is a challenge. What are your thoughts? I'd like to see you overcome it by doing _____.	Immediately	Employee & Direct Manager	
Continuing offense, continuing process/policy/behavior issue, or no improvement on performance area discussed	Make employee and HR aware	Formal conversation with employee Follow up with an email recap to the employee and copy HR	_____ is [still] a challenge. Here are some examples: _____. Here are the ways I expect you to overcome/improve, and I expect to see improvement by _____.	Immediately	Employee & Direct Manager, and copy HR on employee recap email (Will be filed by HR)	
Multiple offenses, larger/continuing process/policy/behavior, or performance issues ongoing/lacking in large area	Discipline employee/send strong message	Formal conversation with employee Document occurrences on formal discussion guide or disciplinary action form with employee signature	See Discussion forms/guides.	After consulting with HR	Employee & Direct Manager, provide copy to HR once complete (or, in some cases, HR may join meeting) (Will be filed by HR)	If employee is director-level, leadership should also be consulted
Multiple offenses or ongoing or large process/policy/behavior issues that require a clear plan of action and commitment to improve	Set clear goals, process, and timeline for improvement and get employee commitment	Formal conversation with employee Create performance improvement plan document and discuss with employee and obtain signature	See Performance Improvement Plan templates.	After consulting with HR	Employee, Direct Manager, and HR (Will be filed by HR)	If employee is director-level, leadership should also be consulted

Workplace Issues & Conflict



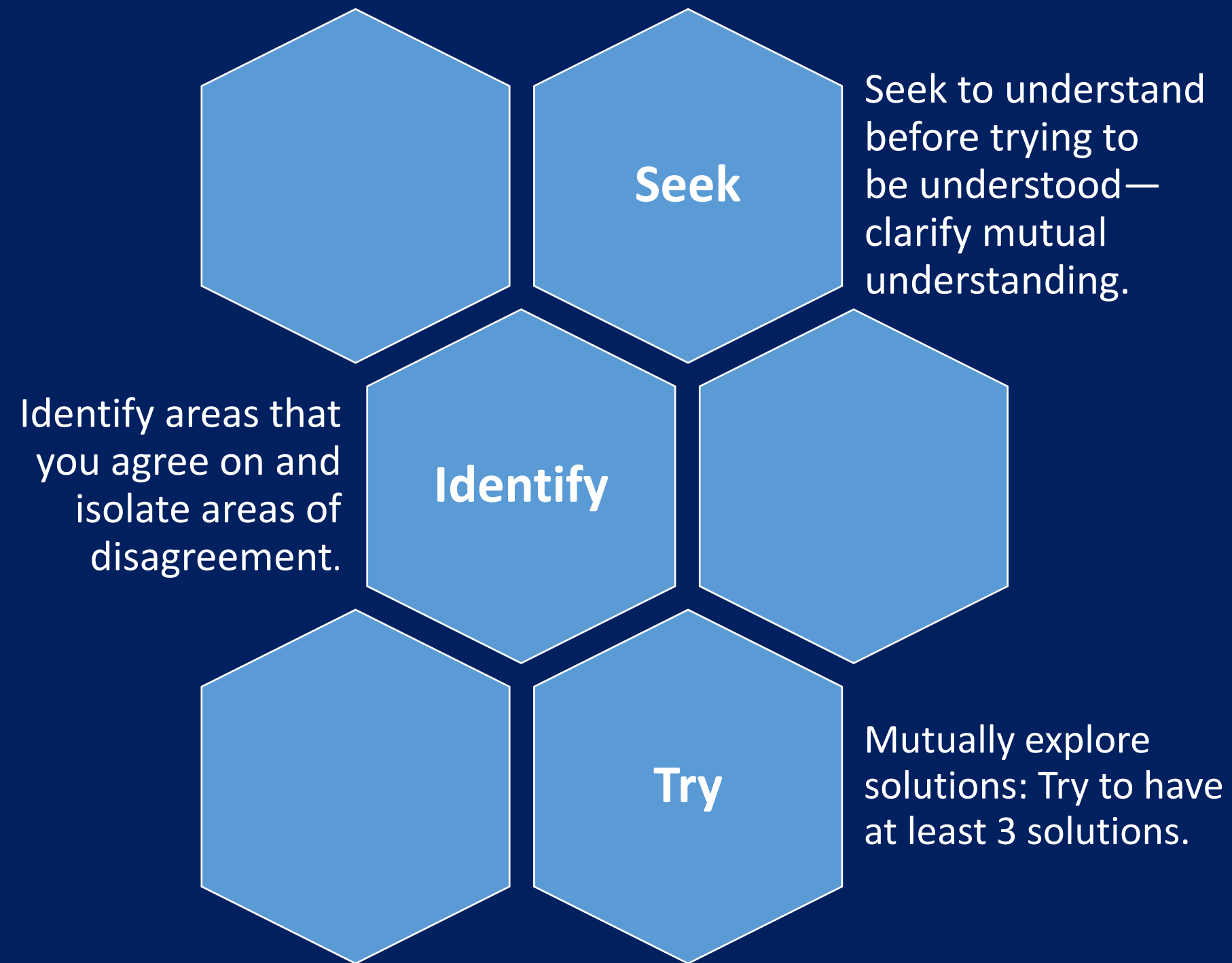
HANNA RESOURCE GROUP

Mindset is Key

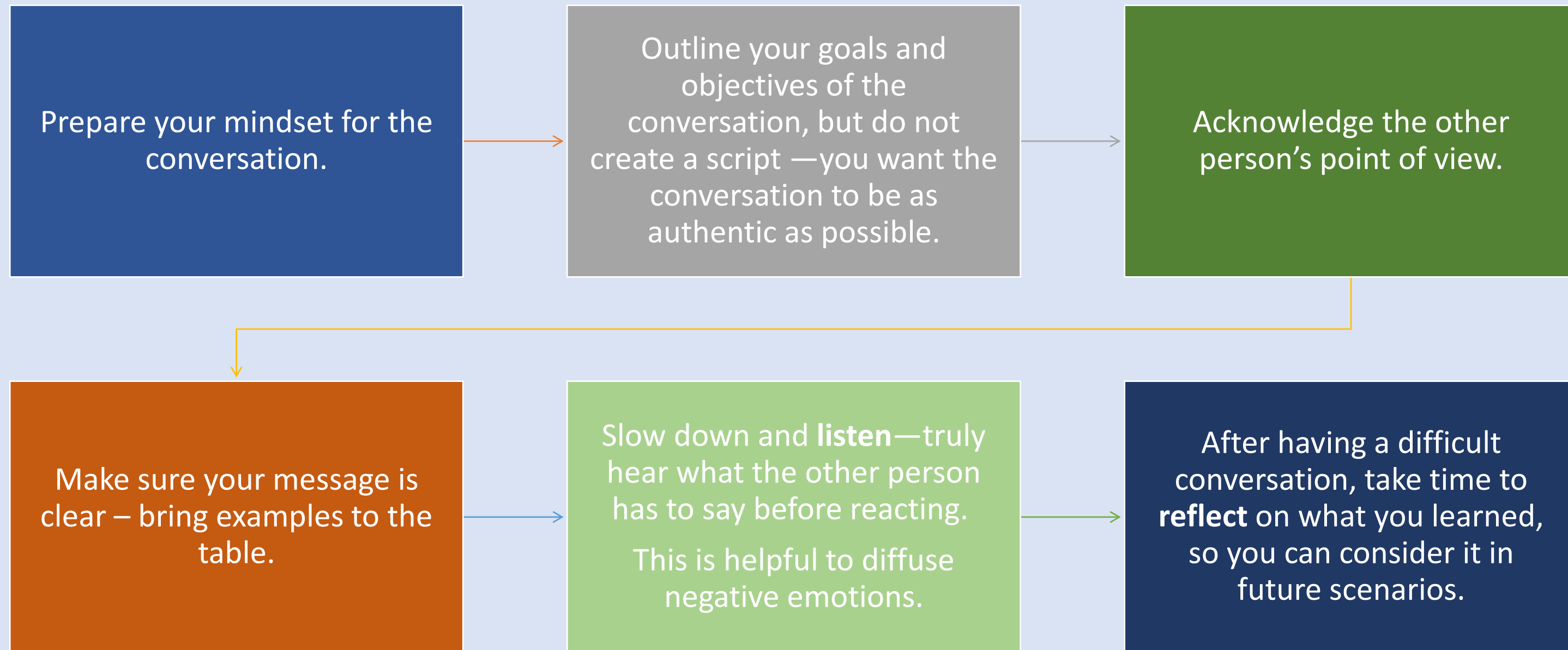
- This conversation or situation HAS to be addressed; at least you will come to it from a place of RESPECT and EMPATHY with a goal towards SOLVING the problem.



SIT with the Conflict



How to Navigate Difficult Conversations



Complaints

Confidentiality

Remember your position of authority

Be aware of potential liability

Know when to escalate

Examples...



Investigation 101

- Obtain written complaint (if possible)
- Review relevant policies
- Perform separate interviews with people directly involved
 - Focus on confidentiality
 - Review physical evidence
 - Document conversations
 - Maintain Objectivity
- Review and next steps:
 - Policy violations/Corrective action
 - Communicate Findings
 - Document

When In Doubt...

- Pull in HR/leadership
- Send employee home WITH PAY
- Consult with employment lawyer
- Consult with HR partner

Recruiting & Onboarding

HANNA RESOURCE GROUP

Recruiting & Onboarding



Manager's Role: Find the BEST candidate to fill the right needs.

Clear Job Descriptions

Dictionary of Occupational Titles/O*Net (Occupational Information Network)

MGMA

Job Analysis

Job Analysis

Accurate job analysis is crucial for effective recruitment if you don't have up to date job descriptions.



Gather the internal data:
Questionnaire, Interview, Direct
Observation, Work Diary/ Log



Research Similar Industry
Positions:
Job boards, industry resources,
O*Net, etc.



Combine Internal and Industry
data to create appropriate
position description AND
requirements.

Recruitment Methods

Recruitment Method	Description
Internal Sourcing	Employee referrals: Encouraging current employees to refer candidates
	Internal job postings: Advertising job openings within the company
External Sourcing	Job boards: Posting vacancies on popular job search platforms
	Professional networks: Utilising industry-specific platforms
	Partnerships: Collaborating with educational institutions or industry associations to tap into networks
Outsourcing	Engaging external agencies to assist with talent acquisition when specific expertise is required



Interviews

We believe in a structured and comprehensive interview and assessment process, including:



Set minimum requirements so unqualified candidates can easily be removed from consideration.



Perform initial phone screen to weed out candidates who are not dependable or unable to answer short set of standardized questions.



Face to face interview with hiring team to get more in-depth on skills, background, and experience using standardized questions.

How Create Questions?

Use the (Accurate!) Job Description to Create Standardized Interview Questions:

TYPE OF QUESTION TO INCLUDE	EXAMPLE
“Get to know you” Questions	Tell us about yourself? Why are you interested in this industry? What is your ideal work environment?
Practical Questions	Have you ever worked with xx tool? What is your process for xx task? Do you have xx certification?
Behavioral Questions	Past Experience: Tell us about a time when you made a mistake; how did you handle that? Was there a situation where xx happened; talk us through your decision making process?
Situational Questions	Future Experience: Let’s imagine xx happened; how would you handle?
Company Culture-Specific Questions	Pull from vision/mission/values or strategy: what does servant leadership mean to you? Which of our xx values resonate with you the most and why?



Standardization is Key!

How We Select

Evaluating candidates objectively based on predetermined, standardized criteria.

Documenting the selection process carefully and maintaining confidentiality.

How To: Interview

DO: 

- **Have structured, job-related questions**
- **Assess soft skills such as communication, teamwork, and problem solving**
- **Be prepared to sell the company to the candidate, as well!**
- **Communicate what the timeline for next steps look like**
- **Follow up with the candidate once the role closes**

How To: Interview

DON'T: 

- **Base decisions solely on gut or intuition**
- **Don't ask discriminatory questions**
- **Don't provide misleading information about career growth or company culture**
- **Don't make promises regarding the hiring decisions or timeline that you cannot fulfill**

Examples of What NOT to Ask:

Disabilities

- Do you have a disability?
- Tell me your medical history.
- How many days were you absent from work for illness last year?
- Characterize your general medical condition or state of health.

Religion

- Where do you go to church?
- What religion are you?

Citizenship

- Are you a United States citizen? (outside the context of the I-9 verification procedure)

Examples of What NOT to Ask:

Convictions/Arrests

- Have you ever been arrested? Background Checks will ensure eligibility for employment.

Marital Status

- Are you married?
- What are your plans for marriage?
- Where does your spouse work?

Age

- How old are you?

Children and Pregnancy

- Do you have any children? What are their ages?
- Do you plan to have children?
- Are you pregnant?
- What are your day care arrangements?
- How do you manage when your child is sick?

Examples of What is OK to Ask

Age

- Are you at least 18 years of age? If not, state your age.

Disability

- Are you able to perform the essential functions of the job with or without accommodation?

Citizenship

- Do you have the legal right or authorization to work in the United States?

Convictions/Arrests

- Have you ever been convicted of a felony? If yes, you may ask for details.

Military Experience

- Have you ever been a member of the US armed services or a state militia? If so, did your military experience have any relationship to the position for which you have applied?

Be Aware of Unconscious Biases



The halo effect—the transfer of goodwill or positive feelings about one characteristic of a person to another, unrelated characteristic



Similarity Bias—favoring employees or hiring candidates due to their personal or professional similarity to managers or interviewers



Gender Bias—perceiving individual behaviors differently on the basis of gender

Onboarding & Orientation

To do:
Give job offer in writing <ul style="list-style-type: none">• Always. Period. Include start date, rate of pay, any contingencies, and at-will disclaimer at minimum.
Issue Background Checks/Drug Screens
Build a New Hire Orientation <ul style="list-style-type: none">• Tour, take them to lunch (or designate someone to do so) in addition to giving them items like handbook, benefits, etc.
Set Expectations <ul style="list-style-type: none">• Convey Work Culture, Review Job Description with them, and let them know milestone expectations



Other Items

HANNA RESOURCE GROUP

COMPENSATION

Utilize free or low-cost salary and labor data

- Kentucky Center for Education and Workforce Statistics (Labor Market Info)
- Bureau Labor Statistics Data
- Membership Groups (KY League of Cities, Second Wind, etc.)
- GuideStar (non-profits)

Once you have the data, will want to consider factors like:

- Experience level/difficulty to hire
- Internal equity
- How data displayed



EMPLOYEE ENGAGEMENT



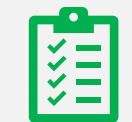
Newsletter



Employee focus groups (wellness, special events, safety)



Stay & exit interviews



Best Places to Work



Employee Survey

Resources

HANNA RESOURCE GROUP

Who Ya Gonna Call?

Society for Human Resource Management (SHRM)
Human Resources Partner
Employment Attorney



Questions?

HANNA RESOURCE GROUP



HR Assessments - HR Outsourcing – Talent Acquisition – Compensation –
Organizational Development

Thank you!



HANNA RESOURCE GROUP

CONTACT US:

allison@hannaresource.com

859.406.4304

[INFO@HANNARESOURCE.COM](mailto:info@hannaresource.com)