

# Overview of HR Management

## Michigan School Business Officials

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# Agenda

- Labor Market Overview
- Issues & Current Trends
- Talent Acquisition
- Onboarding
- Employee Relations
- Compensation
- Succession Planning
- Major Laws & Regulations

# Introduction

- In a competitive marketplace, “human capital is an organization’s only sustainable competitive advantage.” (Barney, J. 1991. Firm Resources and Sustained Competitive Advantage. *Journal of Management*, 17 (1), 99 – 120).
  - Is working for a school system attractive to a potential applicant?
    - What are your current hiring practices?
  - What special recruiting tactics have been effective in making great hires?
  - Who is responsible for Human Resource practices?

# Hiring Statistics

- In a recent study, 85% of HR executives state “the single greatest challenge in workforce management is creating or maintaining their companies’ ability to compete for talent” (Aberdeen Group Inc. / Human Capital Institute).
- Teacher turnover costs the nation’s districts \$7 billion annually for recruiting, hiring and training (National Commission on Teaching and America’s Future).
- Recruiting via social media is growing with 84% of organizations using it currently and 9% planning to use it.(Society of Human Resource Management).

A blurred background image of a business meeting. Four people are seated around a white table, smiling. In the foreground, the back of a woman's head with long brown hair is visible, looking towards the group.

# Labor Market Overview

# Current Environment

## Unemployment Numbers



CHART 2

## Record-High Job Openings

IN MILLIONS



**SOURCE:** Bureau of Labor Statistics, "Job Openings and Labor Turnover Survey," <https://www.bls.gov/jlt/> (accessed June 27, 2022).

BG3716  heritage.org



# Current Environment

## Some Perspective

- February 2020 – MI unemployment – 3.5%
- April 2020 – MI unemployment – 23.6%
- July 2009 – MI unemployment – 15.9% Great Recession
- May 1933 – MI unemployment – 24.9% Great Depression
- August – 2022 MI unemployment – 4.1%

## Current Trends

- Shifting demographics
  - Mobile society = higher turnover
  - Remote/hybrid models
- Increasingly specialized positions
  - Position specific knowledge
- Talent shortages
  - Lack of qualified candidates
  - Competition with other organizations
- Economic instability
  - Limited resources/downsizing
- Reduced employee loyalty
  - “Job hopping” no longer a stigma



## Current Trends - continued

- Talent shortage mitigation
  - Fit job to candidates not candidates to job
  - Hire for attitude, train for skills



The background of the slide is a photograph of an empty classroom. Rows of wooden desks with attached chairs are arranged in the room. At the front of the room, there is a green chalkboard and a wooden teacher's desk. A window with white curtains is visible on the left side of the frame.

## Issues & Current Trends in Schools

# Pre-COVID Concerns

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- Perception of public education
- Communication with constituents
- Mandatory reporting
- Organizational culture
- Special Education/504 plans
- Choice/Charters/Cybers
- Ability to find Math/ELL/CTE instructors
- Retirements/attrition
- Contract issues/hiring/firing





## Pre-COVID Concerns

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- Dealing with the legislature
- High stakes testing
- Evaluation system mandates
- Student discipline, expulsions
- Enrollment and funding
- Outsourcing
- Maintaining proper staffing levels
- Class sizes

# Additional Concerns Following COVID

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- Political instability.
- Ability to align toward a common vision and direction.
- COVID variants
- Learning loss due to COVID (academic and social)
- ESSER funds and future fiscal uncertainty.



# Additional Concerns Following COVID

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- Social media. Cyber bullying and limits on the school's authority to address.
- Increasing number of highly-disruptive students.
- Hiring and retaining staff. Market competitiveness.
- Housing.
- Assault on public education.
- Other unknowns





# What makes your school a great place to work?

The importance of “selling” an applicant:

- Opportunity to work with children and share your knowledge to influence future generations.
- Dynamic environment with a purpose / mission.
- Results-oriented environment.
- Constant personal development (e.g. confidence, communication, leadership, etc...).

# What makes your school a great place to work?

The importance of “selling” an applicant:

- Assist other educators in providing a meaningful education for all students while fostering a supportive working environment.
- Fresh challenges daily while working with an eclectic mix of people.
- Longer holidays (~13 weeks/yr.).
- Generally good benefits.



STATE AND FEDERAL LAWS, MDE/USDE RULES AND REGULATIONS, FEDERAL AND STATE COURT DECISIONS



BOARD OF EDUCATION POLICY



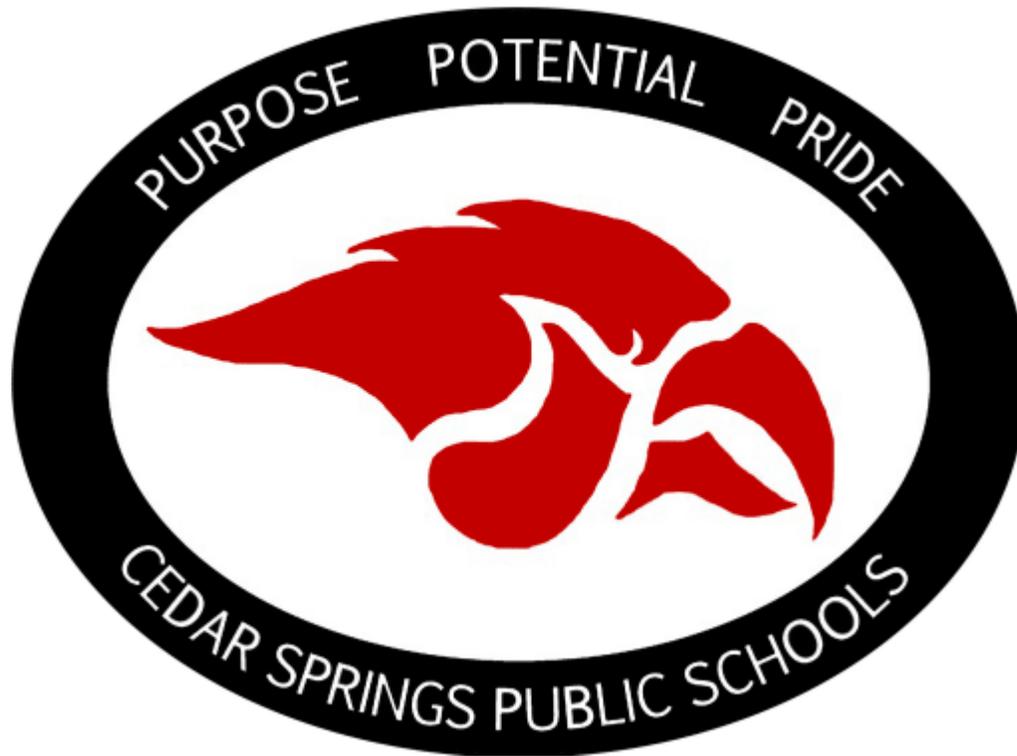
ADMINISTRATIVE GUIDELINES, FORMS



EMPLOYEE HANDBOOK, STUDENT HANDBOOK, ATHLETIC HANDBOOK, TRANSPORTATION HANDBOOK, STUDENT CODE OF CONDUCT

# Governance





# Governance Resource



# Talent Acquisition

# Employer Branding

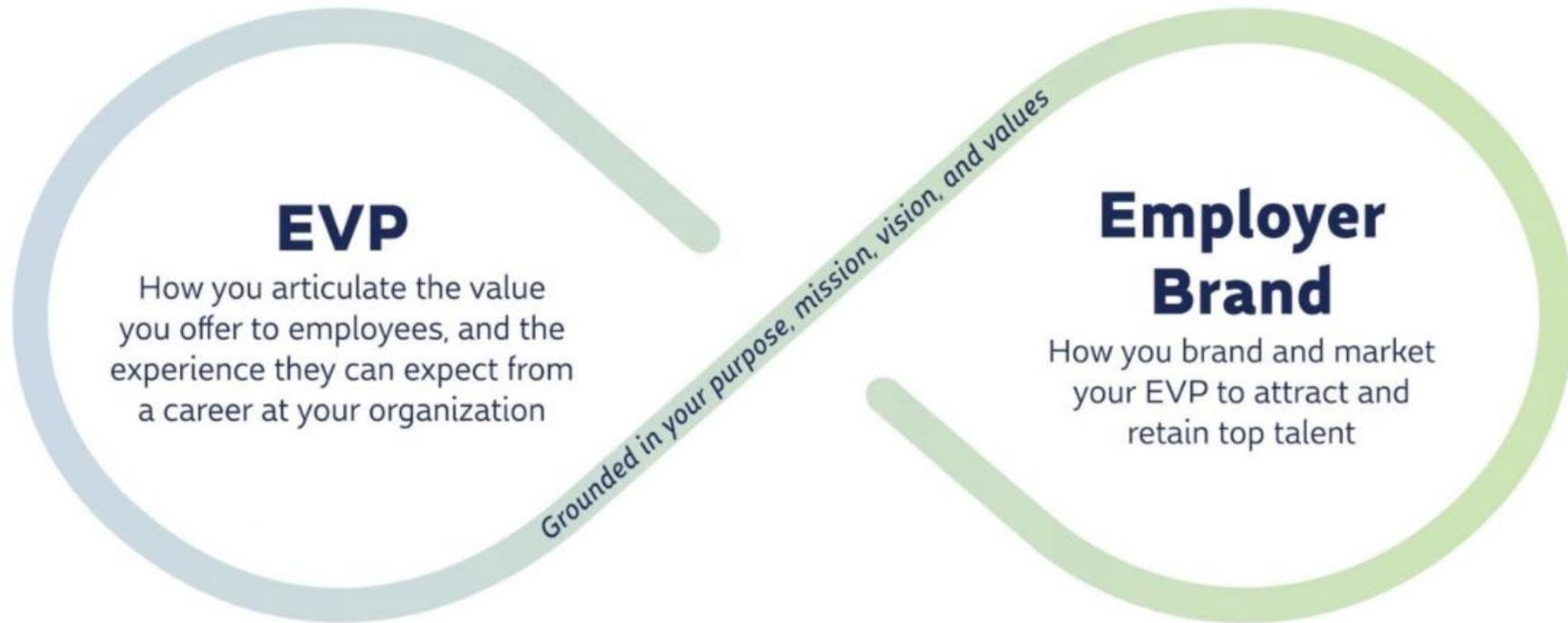
- “Jobvite polled over 1,600 talent acquisition professionals and found that the labor market continues to gain strength, that a shortage of skills is still recruiters' biggest challenge and that employer branding is forecast to take the biggest slice from the recruiting budget.” (SHRM)

# What is your employee value proposition (EVP)?

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- The balance of rewards and benefits that are received by employees at work.
- Employer branding.
- What do your employees say?
  - Employee engagement / satisfaction survey.
  - Exit interviews.





What is an Employee Value Proposition and how is it connected to Employer Brand?

# Attention Drivers and Retention Drivers

Rank	Attraction Drivers	Retention Drivers
1	Base pay/salary	Base pay/salary
2	Job security	Career advancement opportunities
3	Career advancement opportunities	Physical work environment
4	Challenging work	Job security
5	Opportunities to learn new skills	Ability to manage work-related stress
6	Reputation of the organization	Relationship with supervisor/manager
7	Health and wellness benefits	Trust/confidence in senior leadership

Source: Willis Towers Watson, *2016 Global Talent Management and Rewards, and Global Workforce Studies*.

# Employee Value Proposition



## Compensation and Benefits

- Competitive Salary
- Paid Time Off
- Paid Holidays
- Paid Sick Leave
- Paid Parental Leave
- Medical Insurance
- Dental Insurance
- Prescription Insurance
- Vision Insurance
- Life Insurance
- Retirement

Accounts  
• Full Retirement Benefits



## Career Growth

- Raises
- Career Advancement Opportunities
- Leadership Growth Opportunities
- Paid Journeyman and Apprenticeship Programs
- Professional Development
- Tuition

Reimbursement  
• Internship and Mentorship Opportunities



## Corporate Culture

- Collaboration and Team Spirit
- Social Responsibility
- Trust
- Work Life Balance
- Longevity Service Awards
- 40 Plus Year Employees
- Hometown People, Hometown Power
- Utility of the Future

• Community Partner



## Wellness

- Corporate Challenges
- Free, State of the Art Fitness Centers
- On-site and Off-site Fitness Classes
- Financial and Retirement Advising
- Book Club
- Golf League
- Group 5K and Race Participation

• Employee Assistance Program  
• Environmentally minded



## Diversity, Equity & Inclusion

- Corporate Diversity, Equity and Inclusion Program
- Fostering an Environment of Belonging
- Corporate Diversity Initiatives
- Recognition of Diversity as a Business Driver
- Diversity Training
- Sponsor

• Community Diversity Events  
• Ethnic Food Festival

EVP Example

# Current Strategy

- What do you do to attract applicants?
- What are your most common openings?
- What are the most difficult positions to fill?



# Talent Acquisition- Best Practices Process



1. Up to date position description(s)
2. Identify and execute a successful sourcing campaign
3. Credential review
4. Telephone screens
5. On-site interviews
6. Assessments
7. Hiring department interview
8. Background / reference checks
9. Employment offer

# JOB DESCRIPTIONS

A close-up photograph of a hand holding a yellow marker, positioned as if about to write on a white surface. The hand is in sharp focus, while the background is blurred.

**Job Descriptions**



# Why use job descriptions?

- Legal reasons.
- Simplifies the hiring process.
- Provides guidelines for what is expected from the position.
- Communicates major duties / responsibilities.
- Establishes a basis for performance evaluations.
- Assists in benchmarking jobs for compensation purposes.
- Improves employee onboarding and training / development opportunities.



# Basic Job Description Template

Identify:

- Contains title, reporting relationships, exempt/nonexempt status, position summary & essential duties and responsibilities.
- Lists essential functions required under the Americans with Disabilities Act (ADA) and Fair Labor Standards Act (among others).
- Indicates minimum and preferred education and experience requirements.



# Basic Job Description Template

Identify:

- Outlines the required and preferred special skills.
- Contains special requirements of the position.
- Describes the physical requirements and work environment.
- Does not include minor duties/responsibilities or less than 5% of responsibilities.



# Positions that Have Similar Duties

- How to differentiate.
  - If percentage of time for major duties is the same, consolidate where possible.
  - For positions that are “senior level” distinguish differences based on years of experience. Typical experience levels are 1-3; 3-5; 5-7 or more than seven years; upper level, more than 10 years.
  - Indicate special licenses in appropriate area and outline certifications.



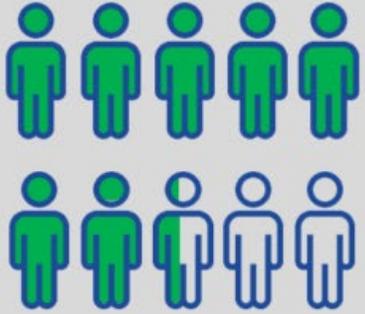
## Position Postings & Advertising



WE'RE  
RING

# Position Advertising

- What materials do you require from the applicant?
  - Resume
  - Cover Letter
  - References
  - Performance Evaluation
  - Work Sample
- Institutions must be committed to creatively targeting as many diverse labor sources as possible.
- Are there any specialized job boards where potential applicants may see your posting?
- Are there any internal employees that may know about a good candidate?
  - Is there a reward for a successful referral?
- Where have previous employees come from / how did they learn about the position?



**73% of millennials** found their last position directly through a social media platform

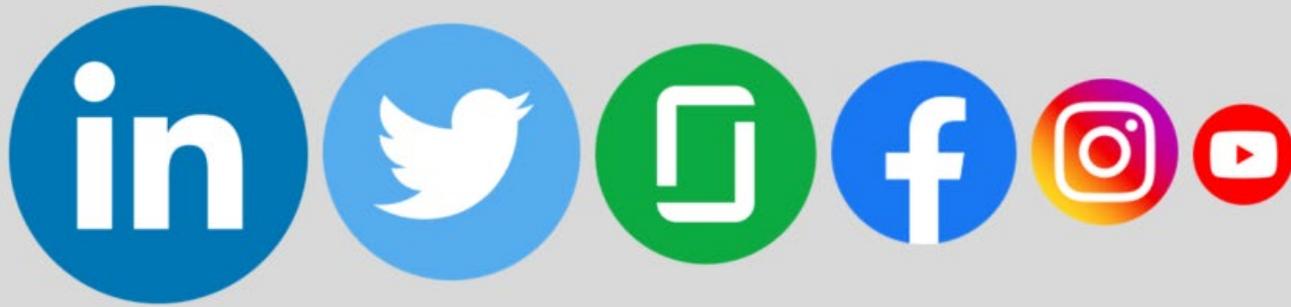
**1 in 2 office** workers can contribute social media to the success of finding their last job



 Job Description Library

## Social Media

## Most popular social media platforms for job search



**LinkedIn** is the **number 1** social media job search platform with **90%** of job seekers using it

 Job Description Library

# Social Media

**41%**

of candidates want to see employee testimonials when researching companies in their job search.

**68%**

of millennials visit a company's social media properties specifically to evaluate an employer's brand.

## Social Media



# Leverage All Avenues to Recruit Top Talent

- Social Media
- “Traditional Advertising.”
- Other sourcing resources:
  - Previous applicants
  - How did current employee find out about openings?
  - Networking with other / nearby school systems.
  - Previous applicant notification system.
  - Pure Michigan Talent Connect.
  - Community newsletter.
  - Internal referral program.
  - Associations (MSBO)



## Internal Candidates

A woman with long, wavy brown hair, wearing a grey blazer over a light blue button-down shirt, is smiling warmly at a man. The man, seen from the back and side, is wearing a light blue dress shirt and has his hands raised in a gesturing motion. They are seated at a white table with a laptop and some papers. The background is a bright, out-of-focus office setting.

# What about Internal Candidates?

- What is your posting process?
- How do you typically handle the review of internal candidate credentials?
  - Advantages
  - Disadvantages
- Qualified internal candidates should go through the same hiring process as external candidates.

A woman with long, curly brown hair is sitting at a desk, looking down at a document she is holding. She has her hand to her chin, appearing thoughtful. In front of her is a laptop. The background shows a window with a view of greenery and a potted plant on the desk.

## Evaluating Applicant Credentials

# How to Evaluate Credentials

- The average Recruiter spends 7 seconds per resume.
- Potential Red Flags:
  - Poor organization
  - Application omissions
  - Grammatical errors
  - Lack of evidence for achievements.
  - Varied and short work history or date exclusions.

## RESUME

Address • City, State, ZIP • Phone Number • E-mail

just for an interview email contact

MINNESOTA  
City, State  
May 2011

City, State  
July 2008 - present

City, State  
Aug. 2008 - present

City, State  
May 2005 - Aug. 2008

City, State  
Jan. 2008 - Feb. 2008

# How to Evaluate Credentials

- Extended gaps in employment.
- Evidence that a career has plateaued (or regressed).
- Leaving a position due to “leadership differences”.
- Temporary assignments.
- Lack of customization to the current opportunity.
- References who are / were not *immediate* supervisors.

# Interviews



# Telephone Screen

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- Why do telephone screens?
- Potential Questions:
  - Why is this position of interest to you?
  - Why are you looking for a position?
  - What previous experience do you have that would be relevant to this position?
  - Ask about general education and experience requirements identified in the position description.
  - What are your salary requirements?
  - How did you learn about the position?
  - Ask clarifications questions that arise from the resume / cover letter.
- All candidates must be asked the same set of questions and internal and external candidates should be treated equally.

# On-Site (or Virtual) Interview

- Once a list of finalists has been identified, each finalist should be notified in advance to provide them with time to prepare for a final interview.
- Ensure the supervisor is prepared for the interview.
- Other key employees may need to be included depending on the leadership level of the position and amount of interaction they may have with other employees.
- Go over all of the position requirements with the candidate.
- Ask candidates to describe specific skills.
- Ask them why they left previous positions and what they know about your organization?

# On-Site (or Virtual) Interview

- Research suggests that behavioral based interview questions are the most effective way to interview potential candidates.
  - e.g. “Tell me about a time...”
- Be consistent - ask all candidates the same questions.
- Learn about their working style and previous accomplishments.
- Determine department fit.

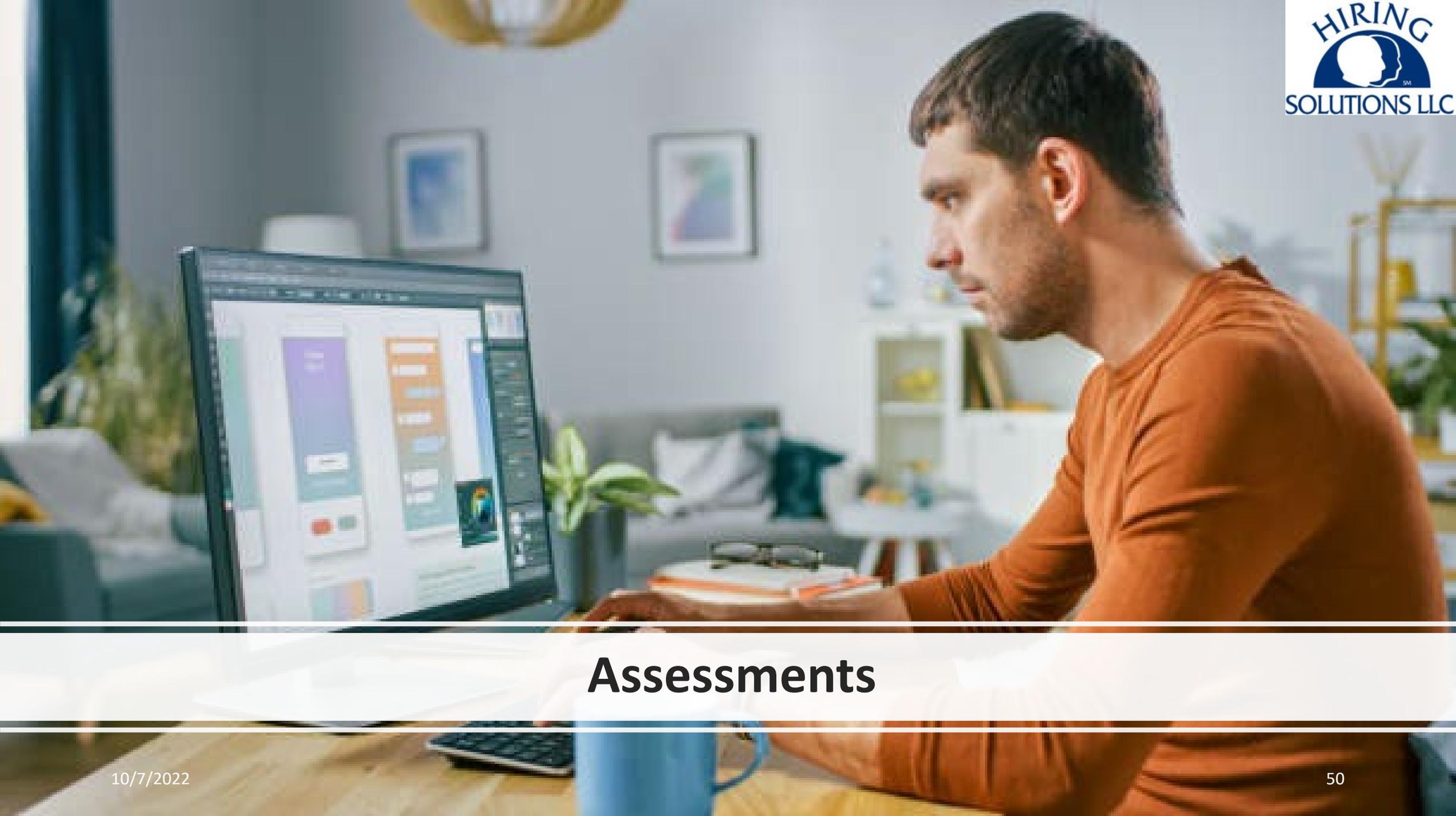
# Interview Areas to Explore

- Starting and final levels of compensation.
- Responsibilities and accountabilities.
- Results, successes and accomplishments.
- Any major mistakes / what would you do differently.
- Most / least enjoyable aspects of the job.
- Reasons for leaving.
- What would former supervisors share about your strengths, weaknesses and general performance.
- What do you want in your next job?
- Rate this job in terms of your ideal position.

A diverse group of people, including men and women of various ages and ethnicities, are looking up at the camera with neutral to slightly smiling expressions. The background is a plain, light color.

# Interview Areas to Avoid

- Federal and State Laws Prohibit Questions pertaining to:
  - Race
  - Gender
  - Religion
  - Marital status
  - Age
  - Weight
  - Disabilities
  - Ethnic background
  - Country of origin
  - Sexual preference

A man with short dark hair, wearing an orange long-sleeved shirt, is sitting at a desk in a modern office. He is looking at a large computer monitor that displays a dashboard with various charts and data. The office has a grey sofa, a white coffee table, and framed pictures on the wall. A blue mug is on the desk in front of him.

# Assessments

# Assessments

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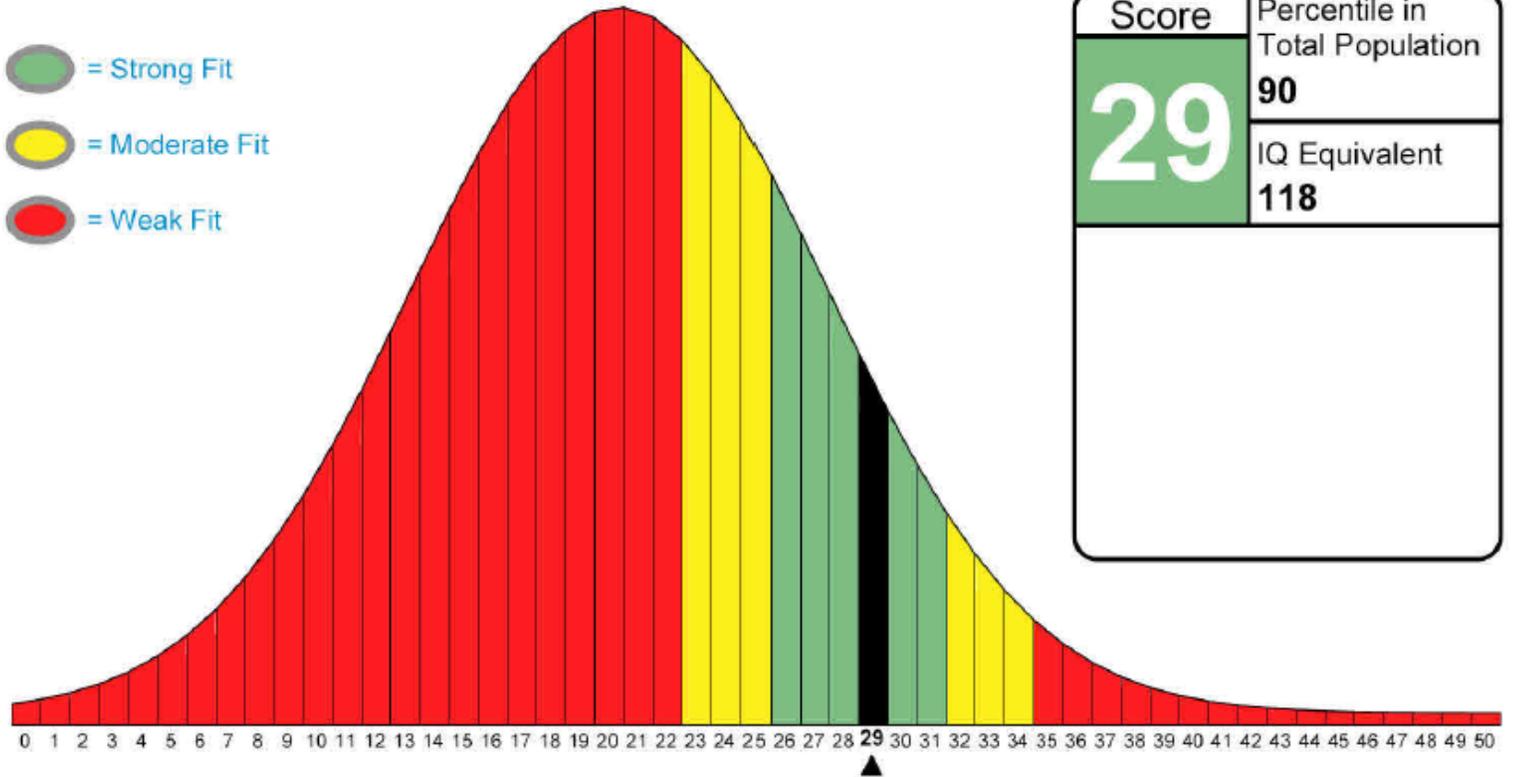
- What kind of assessments should I use?
  - Personality
  - Employee Reliability
  - Mental Acuity
  - Leadership
  - Skill (e.g. Microsoft Word / Microsoft Excel)
- Use assessments that tie closely to job duties or organizational values and only assess final candidates.
- Most accurate predictor when examining potential candidates.



# Cognitive Ability Assessment

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-  = Strong Fit
-  = Moderate Fit
-  = Weak Fit



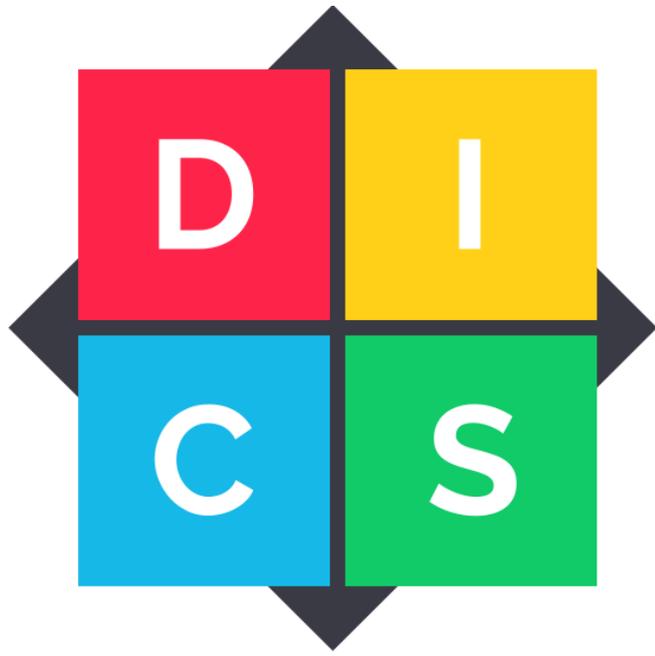
Score	Percentile in Total Population
<b>29</b>	<b>90</b>
	IQ Equivalent
	<b>118</b>

# Personality and Mental Acuity

Mental Aptitudes		1	2	3	4	5	6	7	8	9	
<b>Mental Acuity</b>	Slow to Learn						[ ● - ● - ● - ● ]			<b>9</b>	Fast to Learn
<b>Business Terms</b>	Uninformed					[ ● - ● - ● - ● ]	<b>6</b>				Knowledgeable
<b>Memory Recall</b>	Unaware					[ ● - ● - ● - ● ]				<b>9</b>	Aware
<b>Vocabulary</b>	Limited					[ ● - ● - ● - ● ]		<b>7</b>			Strong
<b>Numerical Perception</b>	Imprecise					[ ● - ● - ● - ● ]			<b>8</b>		Accurate
<b>Mechanical Interest</b>	Indifferent				<b>4</b>						Interested

Personality Dimensions		1	2	3	4	5	6	7	8	9	
<b>Energy</b>	Restless					[ ● - ● - ● - ● ]	<b>6</b>				Calm
<b>Flexibility</b>	Flexible				[ ● - ● - ● - ● ]		<b>6</b>				Rigid
<b>Organization</b>	Disorganized	<b>1</b>			[ ● - ● - ● - ● ]						Planful
<b>Communication</b>	Reserved				[ ● - ● - ● - ● ]	<b>5</b>					Interactive
<b>Emotional Develop.</b>	Impatient					[ ● - ● - ● - ● ]	<b>6</b>				Tolerant
<b>Assertiveness</b>	Cooperative					[ ● - ● - ● - ● ]	<b>6</b>				Authoritative
<b>Competitiveness</b>	Team Player				[ ● - ● - ● - ● ]					<b>9</b>	Individualist
<b>Mental Toughness</b>	Sensitive				[ ● - ● - ● - ● ]				<b>8</b>		Tough
<b>Questioning/Probing</b>	Trusting				[ <b>4</b> - ● - ● - ● ]						Skeptical
<b>Motivation</b>	Security					[ ● - ● - ● - ● ]				<b>9</b>	Recognition

Validity Scales		1	2	3	4	5	6	7	8	9	
<b>Distortion</b>	Frank Answer	[ ● - ● - ● - ● - ● ]					<b>6</b>				Exaggerates
<b>Equivocation</b>	Chose Alternate	[ ● - ● - ● - ● ]			<b>4</b>						Chose Middle

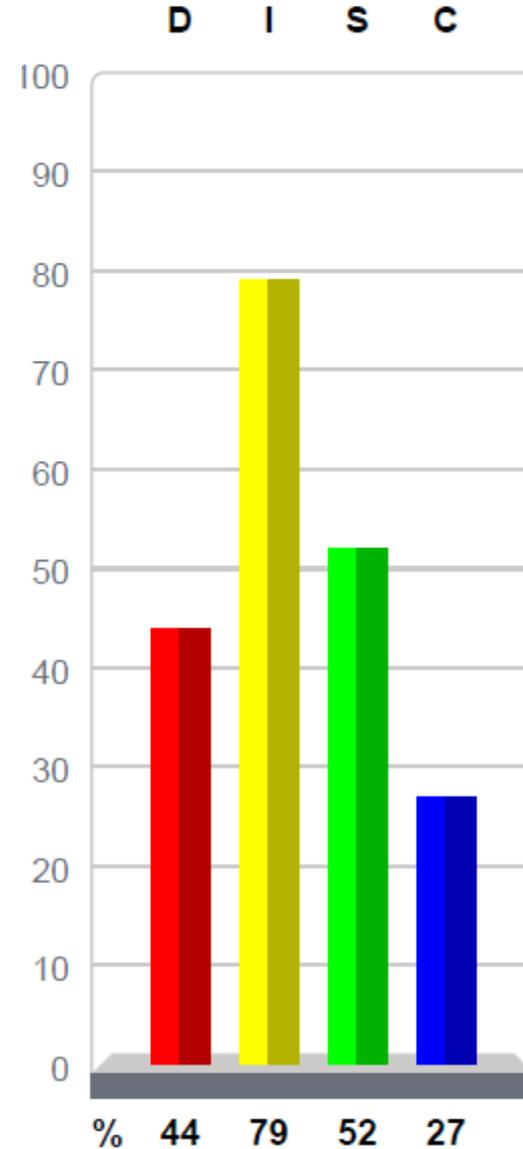


# Leadership

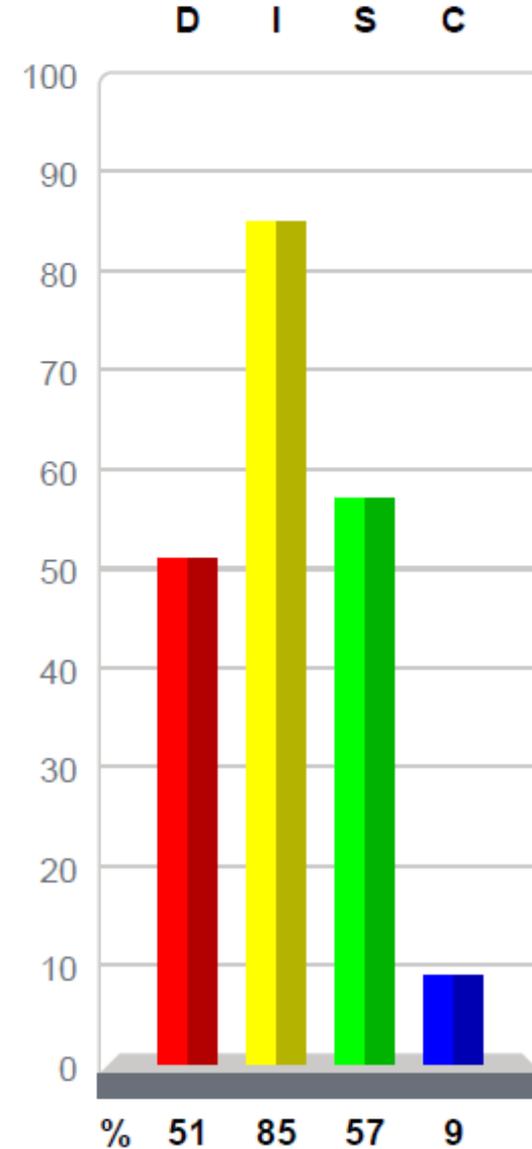
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10/7/2022

Graph I



Graph II





## Selecting Your Candidate

# Review and Selection

- Guidelines:
  - Use specific criteria based on the skills, knowledge and abilities identified in the job description.
    - What skills are transferrable?
    - Could this candidate learn new skills?
    - How does this candidate fit into our future plans?
  - Assign weight to each criterion to objectively evaluate candidates.
  - Look at the entirety of the candidate's application:
    - (1/3) - Interview / Reference Checks
    - (1/3) - Education / Experience
    - (1/3) - Assessments



A man with dark, wavy hair and glasses, wearing a dark blue suit, white shirt, and dark tie, is sitting at a desk. He is smiling broadly and looking down at a white pen he is holding in his right hand. His left hand is clenched into a fist, suggesting excitement or triumph. The background is a blurred office setting.

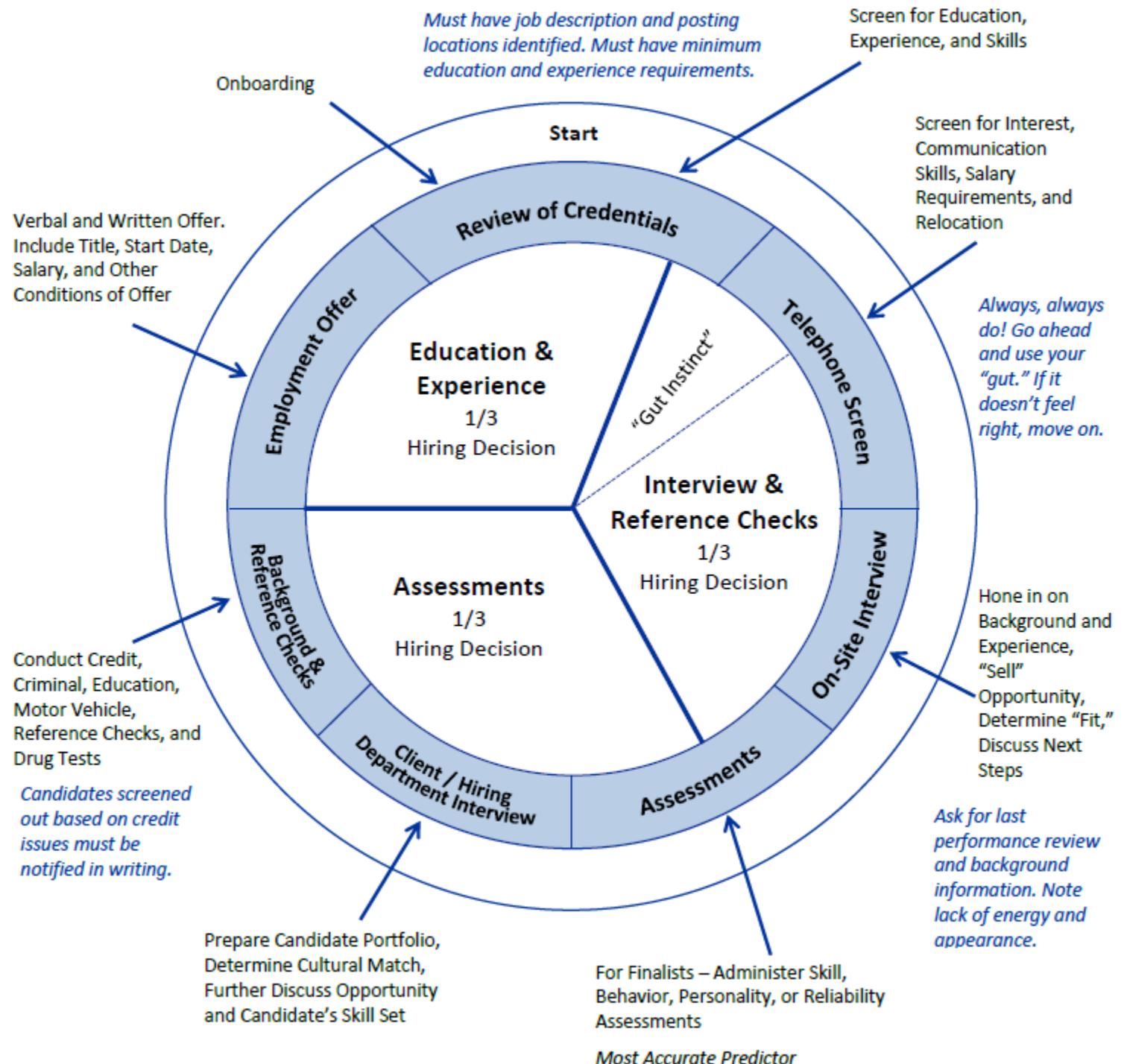
# Employment Offer



# Employment Offer

- How do I determine what to offer?
  - Compensation
  - Benefits
  - Other
- Once a final selection has been made, the supervisor of the position should call and make the offer.
  - If a background check has not been completed ensure that the offer is contingent on a clear background check.
  - Be sure to include an expiration date on the offer.
- After the offer has been accepted notify all other finalists before any public announcements.

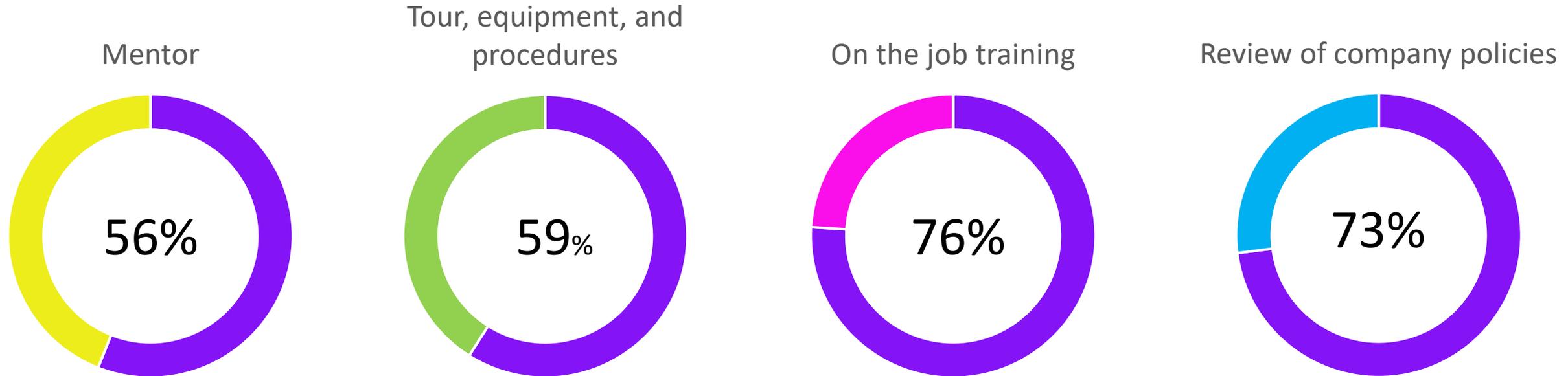
# What does a good process look like?





# Onboarding

# What do new hires want their first week on the job?



New hires want to learn how to do their job within their first week in order to start doing meaningful work and contribute as quickly as possible.



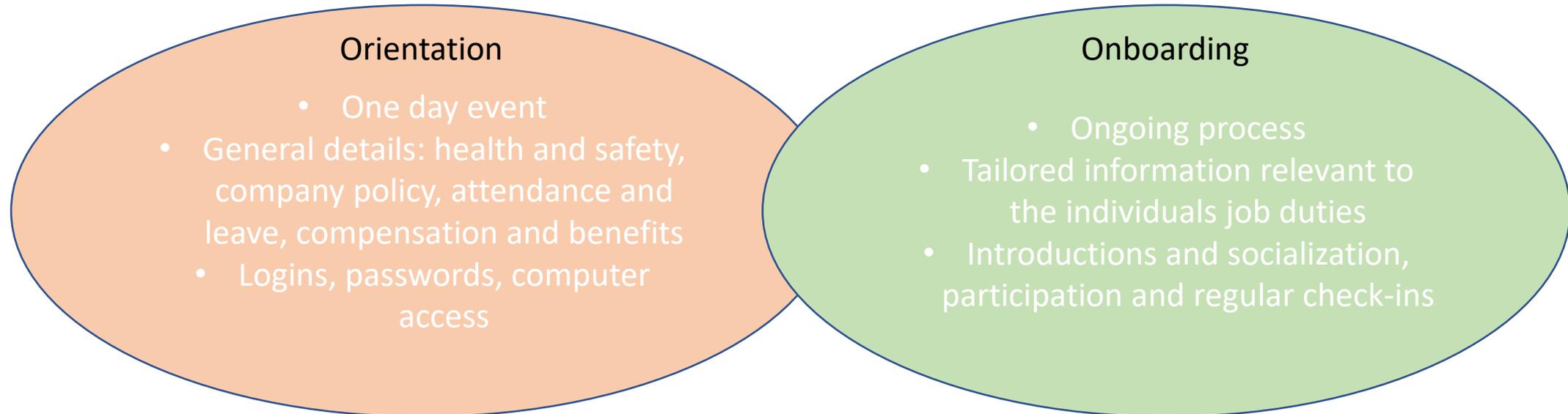
# What is Onboarding?

- Acclimating new employees into the company by providing the knowledge and tools for them to succeed in their new position
- The bridge between the hiring process and productivity
  - Including activities from pre-employment through the end of the first year
- Employees want their managers, not HR, to take charge in the onboarding process
- Employees are deciding if they like the company, the culture, and the position they've accepted



# Orientation vs. Onboarding

- Onboarding is often confused with orientation
- Not a process that can be thrown together after your new hire starts on day one
- It's something you need to think hard about
  - Have a set plan in place before a new hire starts
- Comprehensive process involving managers and employees that should last up to a year

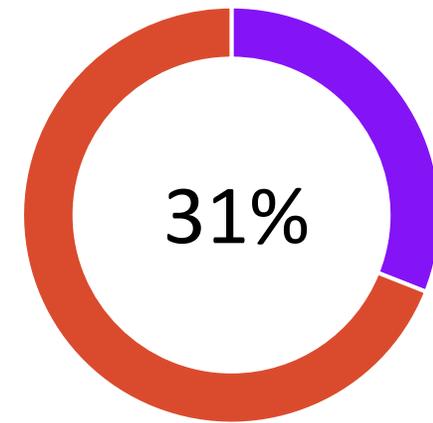


# Importance

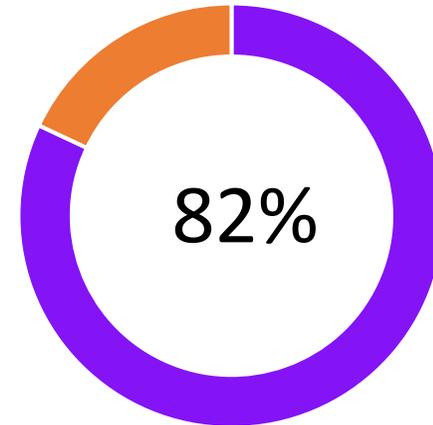
- How employers handle the first few days and months of a new employee's experience is crucial to ensuring high retention
- Invest in new hires, give an exceptional first experience so both parties know they made the right choice
- Successful onboarding programs can lead to higher job satisfaction, increased employee participation and performance, and lower turnover rates within an organization

Did you know?

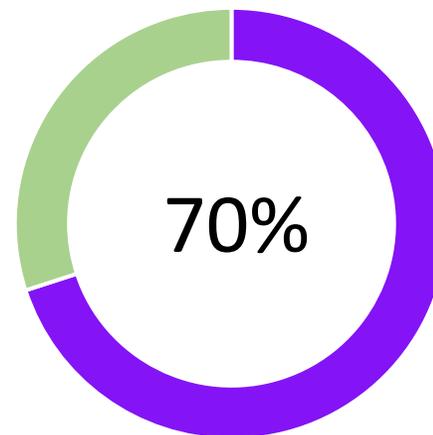
31% of people have quit a job within the first 6 months



Companies with a strong onboarding process improve new hire retention by 82%



Companies with a strong onboarding process improve new hire productivity by over 70%

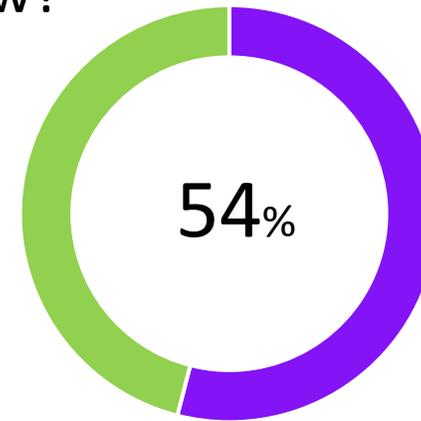
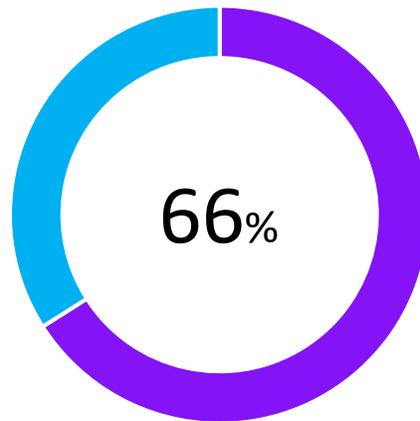


# Goals of Onboarding

- Teach new hires about the mission, vision, values and culture of the organization
- Proper onboarding ensures that new employees fully understand their roles and how they relate to the organization's operations

Did you know?

66% of companies with onboarding programs claimed a higher rate of successful assimilation of new hires into company culture

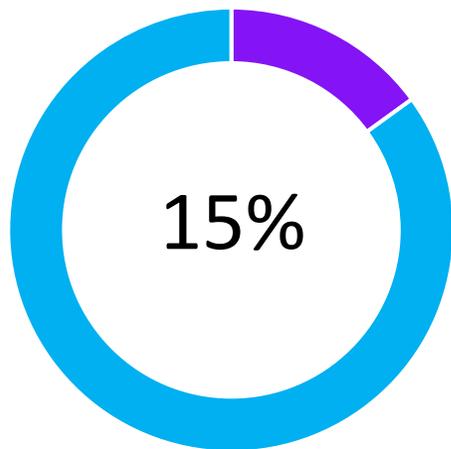


54% of companies with onboarding programs reported higher employee engagement

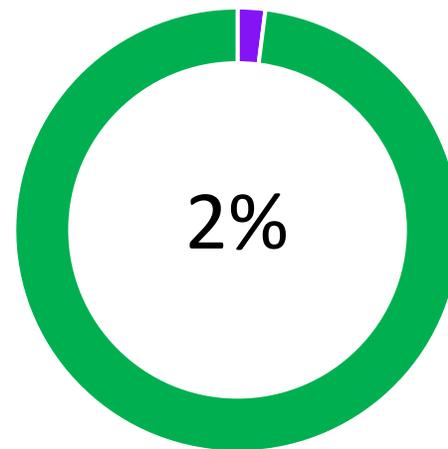
# Challenges

- Avoid misleading job descriptions and dishonesty in interviews
- Managers must be held accountable for correctly executing an onboarding program
- Establishing performance metrics for hiring managers that address their role in the onboarding process
- Three critical drivers of employee engagement: onboarding, talent development, and talent retention

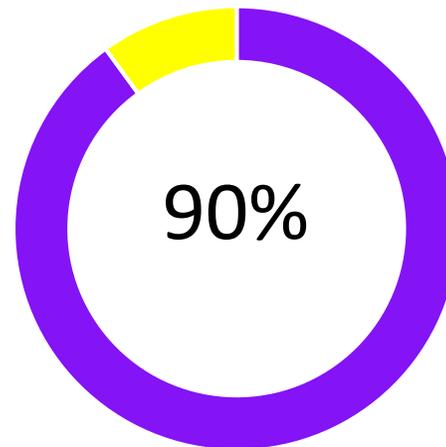
Did you know?



Only 15% of employers continue onboarding programs after the first month

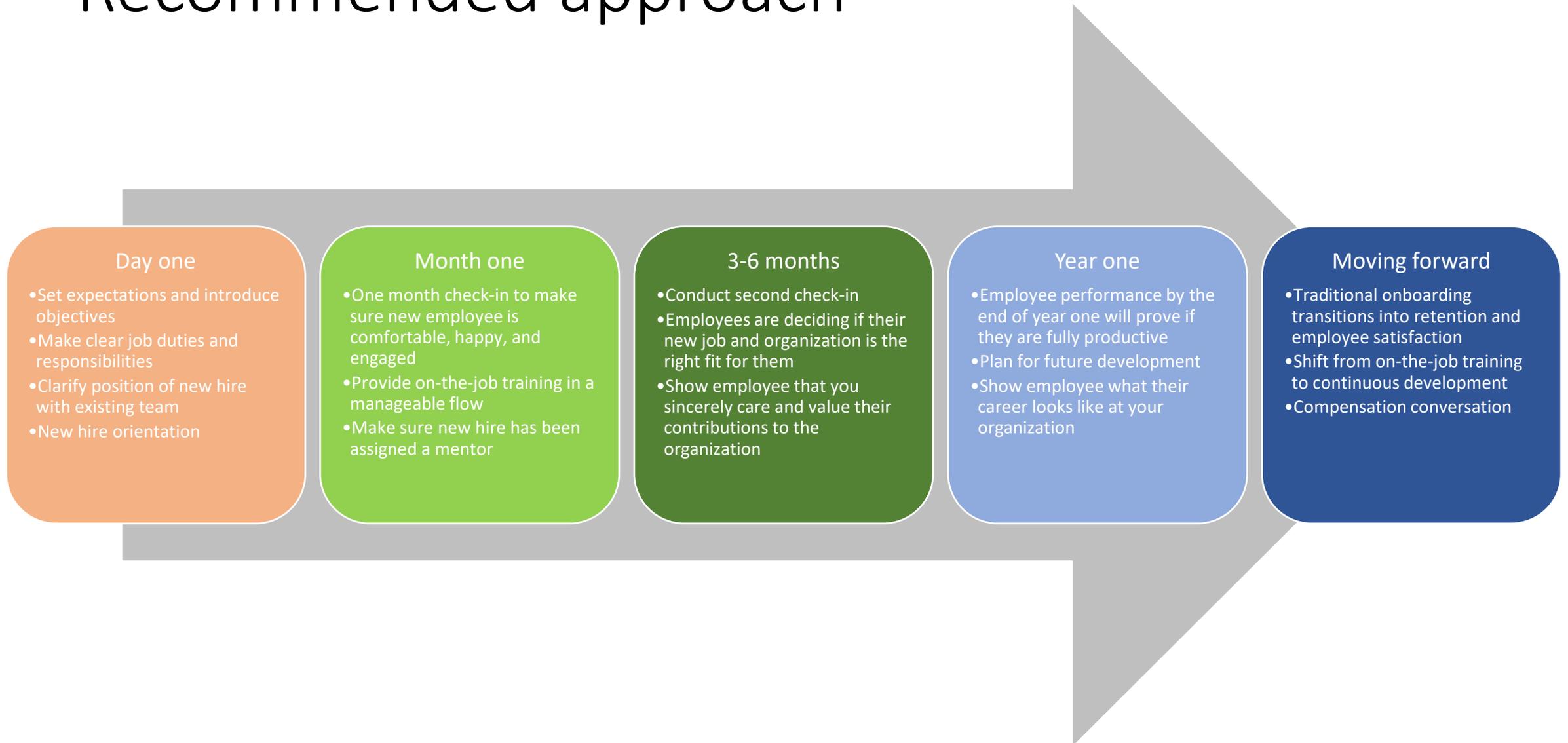


Only 2% of employers continue onboarding programs after the first 6 months



90% of employees decide if their new job is the right fit for them within the first 6 months

# Recommended approach





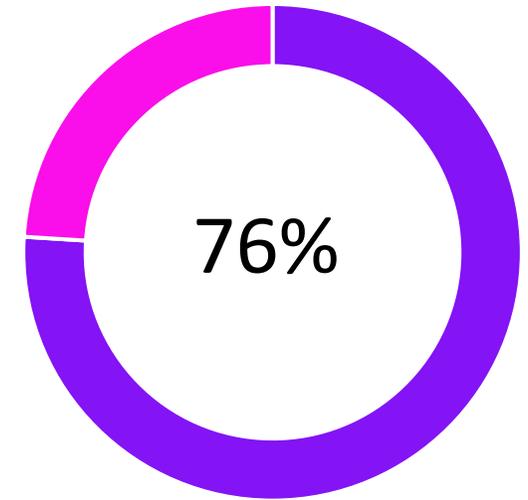
# Company Culture

- Provide new employee with company handbook to review mission statement, expectations, policies and procedures
- Be honest and upfront during the hiring process about company culture, type of work, management style, and responsibilities
- If you don't engage new employees, they won't engage either
- Direct communication
  - Set up weekly check-in's and answer any questions that may arise
- Create an emotional connection between the new hire and the organization
- Take onboarding personally

# Training

- Clear guideline and training plans
- Through onboarding programs that extend longer than an employee's first week
- Reviewing organized, relevant, and well-timed content
- Training needs to be organized, relevant, and well-timed
  - Content is only valuable if new employees know how to apply it
- Review of onboarding periodically
  - first week, 30, 60, 90 days, 1 year

Did you know?



76% of new hires agree that on-the-job training is the most important thing a new employee needs to get up to speed and begin contributing quickly.

# Mentorship

- Effective onboarding requires managers and mentors to be involved and engaged
- Management and mentors need to provide early feedback and clear expectations
  - Continue this practice over an extended period of time, not just during the first few weeks
- New employees seek belonging and collaboration with other employees
- Those committed to the organization's purpose are driven by helping others
- Help employees make personal connections with co-workers

Did you know?



The Aberdeen Group report found that high-performing organizations are nearly **2.5 times more likely** than lower-performing organizations to assign a mentor or coach during the onboarding process.

# Socialization

- Team building activities can help new hires socialize and get to know both new and tenured employees in a more relaxed, less intimidating environment
- Starting a new job requires new employees to meet a number of new coworkers
  - This means onboarding can be a highly charged social experience, or an isolating one
- Help new employees build social capital
  - Networks of people and information that can foster learning and growth while also focusing on retention and engagement
- New hires need to know who they can ask for help, experience a sense of belonging, and feel positive about their new role and company



ONBOARDING



SUCCESS

# George Bradt's Three A's

## Accommodate

- Make new hires comfortable when they arrive
- Show them around, introduce them to coworkers
- Create a welcome package- office supplies, company merch, etc.
- Let the new hire know you are excited to have them there

## Assimilate

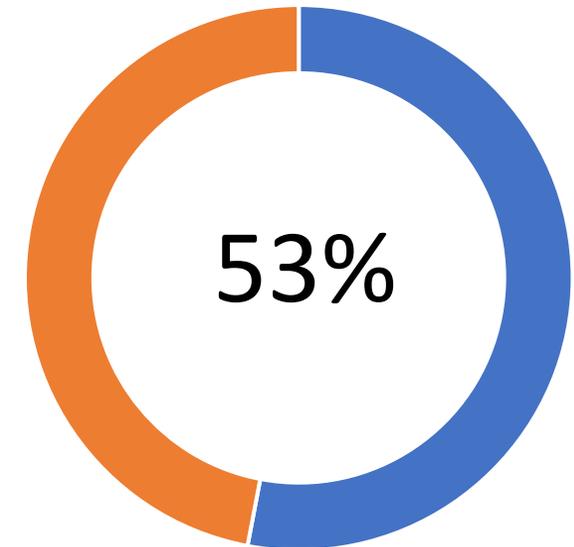
- Help new hires feel wanted and accepted
- Roundup team and introduce new hires
- Assign mentor to help new employee feel they have a safe space to ask questions
- Mentor should be a coworker they interact with often, like a member of their department, not their manager

## Accelerate

- Do not overwhelm new employees, even if they want to become productive as quickly as possible
- Give new hires information they need in a manageable, steady stream
- Follow up with early review and feedback in order to get new hires up to speed and contributing quickly

## Did you know?

In Bradt's survey, it was reported that 53% of employees who quit jobs within the first six months attributed it to lack of review and feedback of early contributions



A photograph of four office workers sitting around a table in a bright, modern office. A woman in a white shirt and dark vest is on the left, looking at a laptop. A man in a white shirt and glasses is in the center, looking at a tablet. A woman with short curly hair and glasses is on the right, holding a pen and a green folder, looking at a tablet. A man's face is partially visible on the far right. The table has a laptop, a tablet, a small potted plant, and a white mug. The background shows a brick wall and a bicycle.

## Performance Evaluations, Goals & Objectives

I FINISHED YOUR  
PERFORMANCE  
REVIEW.



ert.com DilbertCartoonist@gmail.com

TERRIFIC. IT'S NINE  
MONTHS LATE AND ALL  
YOU DID WAS SIGN  
WHAT I WROTE.



©2012 Scott Adams, Inc. /Dist. by Universal Uclick

I THINK I ALSO READ  
IT, BUT I'M NOT 100%  
POSITIVE.



# Performance Evaluations

1. Tracks employee progress
2. Improves workplace productivity, training, projects
3. Makes employees feel valued
4. Engages employees
5. Deals with workplace issues - Performance Improvement Plans (PIP)
6. Builds and strengthens work relationships



# Developing SMART Goals

# S

**SPECIFIC**



Make goals clear and **specific**.

# M

**MEASURABLE**



Define **measurable** assets.

# A

**ATTAINABLE**



Confirm your goals are **attainable**.

# R

**RELEVANT**



Verify your goals are **relevant**.

# T

**TIME-BASED**



Set up a **time-based** plan.



# How to Write & Measure Goals

- **Step One:** Review key issue areas
  - What problems need to be solved?
  - What improvements can be made?
  - What new things can be done?
  - What routine things should be remembered?
- **Step Two:** Develop the measures, targets, standards or expectations which will define successful performance
  - Define *what* you want to accomplish - define the end result or outcome
  - Define *how well* you want to accomplish it - describe the end result or desired outcome



# How to Write & Measure Goals

- General forms of measurement ranging from objective to subjective
  1. **Direct Counts – the most objective type of measure**  
Examples: Number of invoices processed, number of dollars saved
  2. **Ratios – fairly objective. Compares actual performance achieved to the number of opportunities the individual had to perform**  
Examples: percentage of units rejected, turnover rate
  3. **Date of Completion – used for implementing new programs or establishing milestones on major projects**  
Example: November 1, 2033 complete XYZ report



# How to Write & Measure Goals

4. **Judgment Scale – a way to quantify judgments, allows you to grade performance between extremes.**
  - Example: rating a supervisor’s effectiveness in motivating staff members on a scale of one to five.
5. **General Description – the most subjective measure. Can be made less subjective by combining several measures.**
  - Example: objective is to establish effective working relationships with peers and subordinates.
  - Decrease the subjectivity by using the following measurements: Quality of consultative services provided to other department staff, degree of participation in team problem solving.

Confidential

## Complaints & Conducting an Internal Investigation

# How to Handle Complaints

- What do I do?
  - Review the complaint procedure.
  - Communicate with all parties and set expectations.
    - Importance of confidentiality.
  - Investigate the claim.
  - Take detailed notes and verify the facts.
  - Follow up.
  - Follow through.
  - Be aware of union rules.

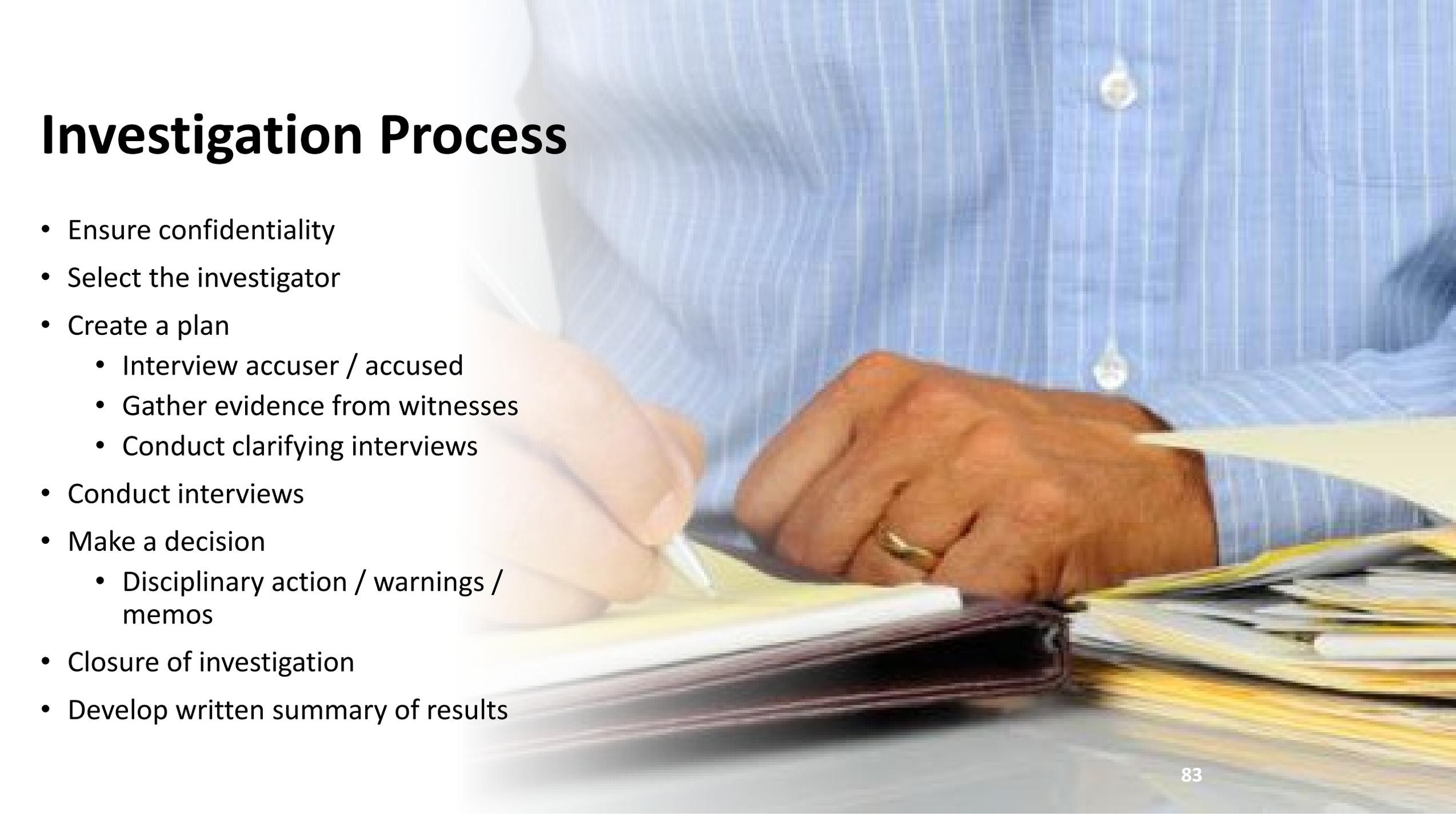


A close-up photograph of a person's hands and torso. The person is wearing a light blue, vertically striped button-down shirt. Their right hand is holding a silver and black pen, writing on a yellow notepad. Their left hand is resting on the notepad, with a gold ring visible on the ring finger. The background is a plain, light-colored wall.

# When and How to Conduct an Internal Investigation

- How do I know when to conduct an investigation?
- What is a complaint?
- Criminal vs internal
- Role of the collective bargaining agreement
  - Timeline / union rep role
- Process
- Timeline
- Critical concepts:
  - Just cause
  - Due process
  - Weingarten Rights (right to union representation during investigatory interviews)

# Investigation Process

A close-up photograph of a person wearing a blue and white striped button-down shirt. The person's hands are visible; the right hand is holding a silver pen and writing on a yellow notepad. The left hand is resting on a stack of papers. The background is slightly blurred, showing more of the shirt and the desk area.

- Ensure confidentiality
- Select the investigator
- Create a plan
  - Interview accuser / accused
  - Gather evidence from witnesses
  - Conduct clarifying interviews
- Conduct interviews
- Make a decision
  - Disciplinary action / warnings / memos
- Closure of investigation
- Develop written summary of results

# Employee Discipline

- Review investigation, facts and timeline (as set forth by the Handbook / collective bargaining agreement).
- What is reasonable?
  - What is the precedent?
  - Just cause- did the employee know this was wrong?
- Determine course of action and prepare formal document.
  - Present to employee and place in personnel file.

A photograph of four diverse office workers sitting around a desk in a modern office setting. From left to right: a Black man in a grey cardigan, an Asian woman in a white turtleneck, a woman wearing a grey hijab, and a Black woman in a light pink blazer. They are all smiling and looking towards the right. On the desk are two laptops, a pen holder with pencils, a small potted plant, and a coffee cup.

# Compensation



# Compensation

- Why is pay important?
- How do you determine new employee pay rates?
- How do you know where you stand in the market?
- What is your pay strategy?
- What are some of your most pressing compensation issues?
  - Pensions
  - Healthcare contributions



# General Compensation Review

- What are your benefits as a percent of payroll? (SHRM- 47%)
  1. Voluntary (19%) – medical / dental / vision / prescription plans, and flexible spending accounts.
  2. Mandatory (18%) – unemployment, workers compensation and social security.
  3. Pay for time not worked (10%) – vacation, holidays, personal days, bereavement and sick leave.
- What is “Total Compensation?”
  - Why is this important?
  - Do you share this with employees?

## Total Reward Elements

*Total Rewards* are the policies, programs, and practices that provide employees with something of value in return for their contributions to the business objectives and goals of the organization.



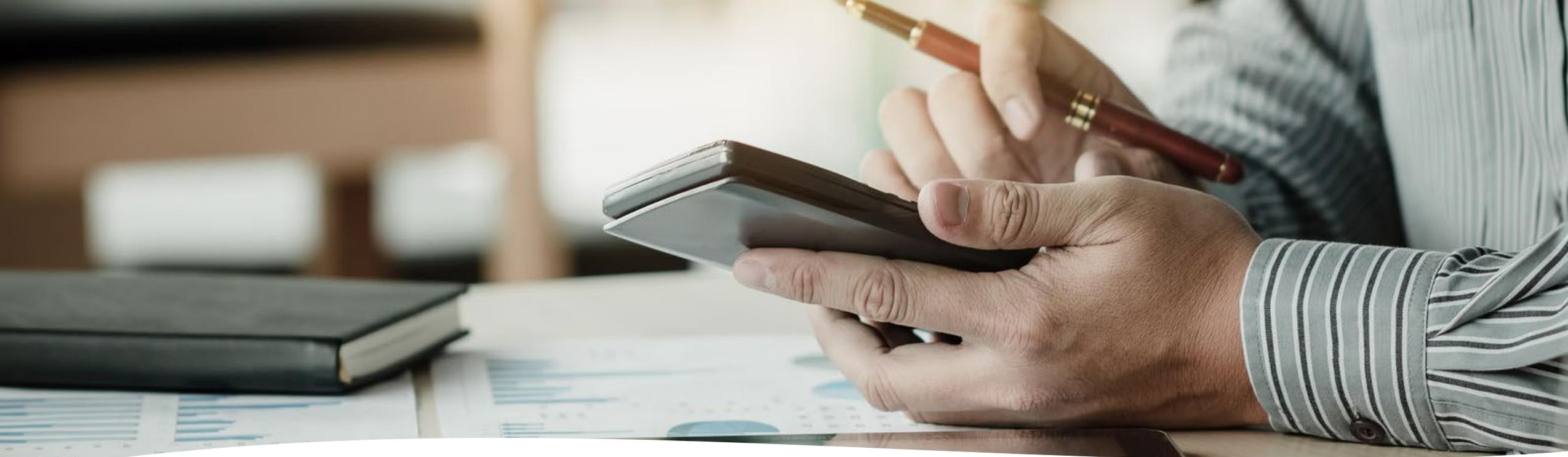
# Total Compensation

# Who do you trust?

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The 'Comp Chasm'		
Sentiment	Employees	Employers
Believe that employees are paid fairly	36%	73%
Believe that employees are valued at work	45%	78%
Report that their company is transparent about pay	21%	40%

*Source: PayScale*



# Common Compensation Challenges

1. Compression / Internal Equity
2. External Equity
3. Salary Ranges
4. Employee Performance
5. Legal Implications (i.e. FLSA)
6. Disparity (i.e. gender, age, etc...)

# How is new employee pay determined?

---

- How do you know if you are paying appropriately?
- Role of:
  - External competition
  - Incumbent background
    - Education
    - Experience
    - KSAs...
  - Position description
  - Performance





# Why conduct a labor market study?

---

1. Internal Equity.
    - Appeals mechanism for employees.
  2. External Equity.
    - Attract, retain, and motivate the best.
- What about position descriptions?
  - How frequently should one review their compensation structure?
    - Full scale review vs. benchmarking?
  - Types of pay systems:
    - Job Evaluation / Compensable Factors.
      - Multiple tracks?
    - Knowledge Based Pay.

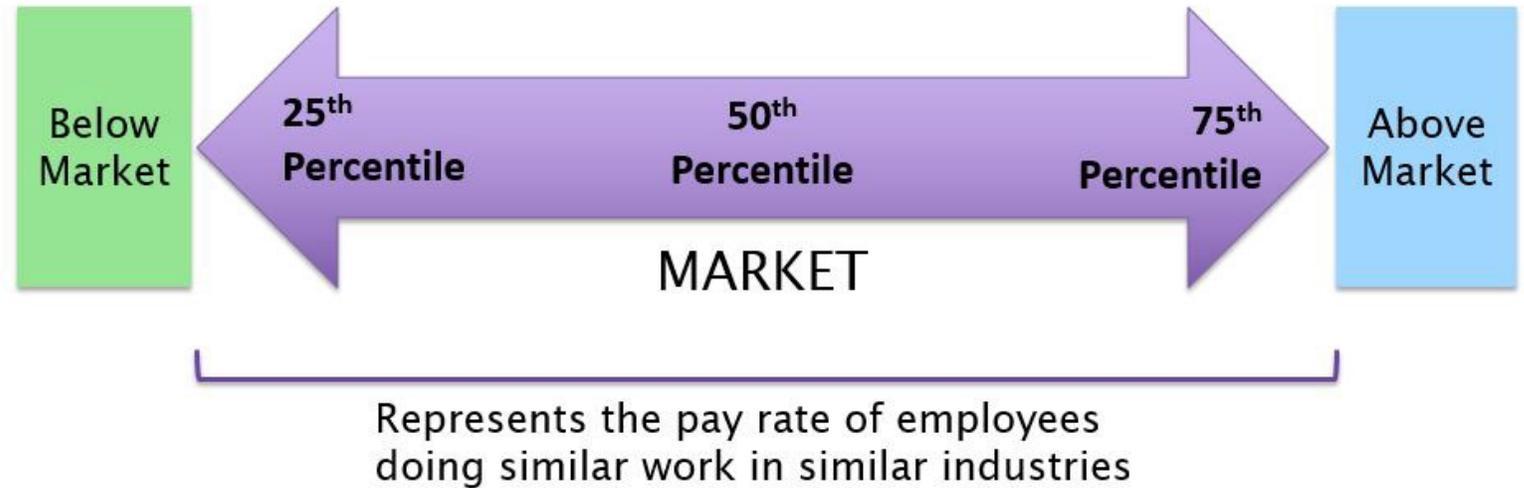


# Steps to conduct a labor market study

- 1) Identify your pay policy (lead, match, lag).
- 2) What / how many labor sources will you use?
  - Sources: similar organizations, other employers, published salary survey data.
  - Potential data sources: WorldatWork, SHRM, State of Michigan, BLS, etc...
- 3) Are your position descriptions up to date?
- 4) Match positions with data sources.
- 5) Benefits offset?
- 6) Compa-ratios and weighting to determine the competitive labor market rate.
  - Performance / longevity considerations?
- 7) Salary ranges vs. steps.
- 8) When to recommend changes in pay.

# Determining Salary Range Minimums and Maximums

---



Example:

Midpoint = \$50,000 and spread = 20%.

Minimum:  $50,000 / 1.1 = \$45,455$ .

Maximum:  $\$45,455 * 1.2 = \$54,545$ .

Range = \$45,455 – 54,545.

A diverse group of business professionals, including a woman with glasses and a man in a suit, are gathered around a table in a meeting. They are smiling and looking at documents, including a 'BUSINESS PLAN' with charts. The scene is brightly lit and professional.

# Best Practices in Compensation

- Pay ranges or steps
  - With appropriate range spreads
  - Based on market data
- Current position descriptions
- Performance evaluations
- Sharing of “Total Compensation” information

A photograph of a business meeting. In the foreground, a man with a beard and glasses, wearing a dark blue suit and a patterned tie, is looking at a tablet held by a woman in a light-colored blazer. They are both smiling and appear to be in a collaborative discussion. In the background, another man in a suit is standing near a green chalkboard, holding a document. The setting is a modern office with large windows.

## Succession Planning



## Why is This Such a “Hot Topic?”

- Difficult topic to discuss.
- Lack of internal employee development.
  - Managers feel employees are not ready.
  - Employees feel they don't have promotional opportunities.
- Increased Turnover
  - Retirements
  - Burnout
  - Pursue new career opportunities
  - Work-from-Home
  - More money

## Current Trends

- Shifting demographics
  - Mobile society = higher turnover
- Increasingly specialized positions
  - Position specific knowledge
- Talent shortages
  - Lack of qualified candidates
  - Competition with other organizations
- Economic instability
  - Limited resources/downsizing
- Reduced employee loyalty
  - “Job hopping” no longer a stigma



## **Designate a Leader and Advisors**

- Who should lead a succession plan?
- Who needs to be involved?
- What is the typical approval process?
- Do you need outside experts?



## Examine and Evaluate Potential

- The future may not be like the present or the past.
  - What trends could impact the organization?
  - What are the organization's strategic objectives and future incumbent requirements?
  - Analyze external sources for talent



## Examine and Evaluate Potential (cont.)

- External Analysis
  - External recruitment strategy
  - Recruitment/relocation bonus
  - Special programs
  - Retention strategy
  - Retention bonuses
  - Quality of work-life programs
- Internal Analysis
  - Planned job assignments/career growth
  - Formal development
  - Coaching/mentoring
  - Assessment and feedback
  - Shadowing





## Steps Involved in Succession Planning

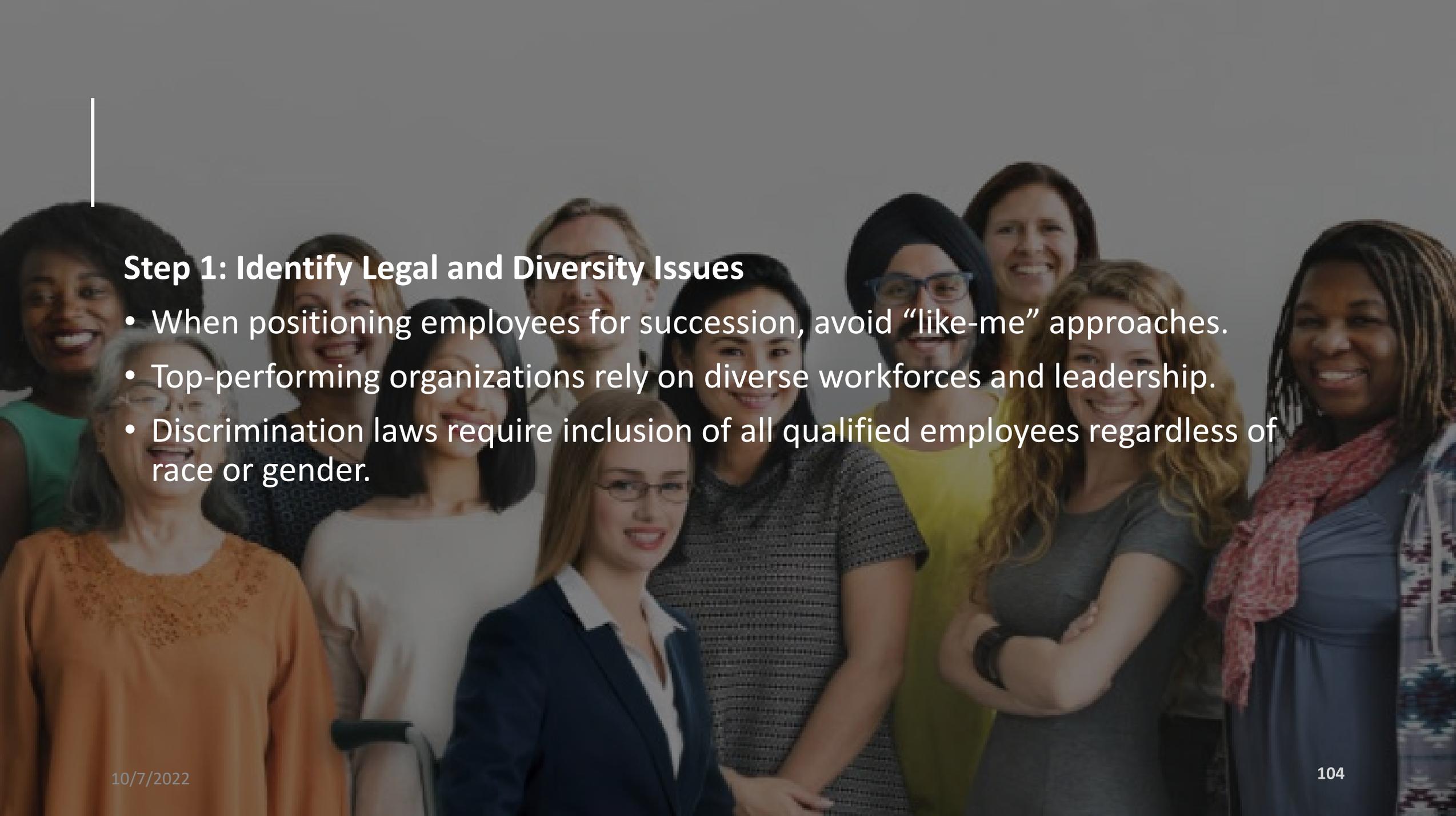
1. Identifying legal and diversity issues to consider.
2. Establishing present and future leadership roles and objectives.
3. Selecting key employees.
4. Evaluating the strengths, weaknesses and readiness for succession in key employees.





## Steps Involved in Succession Planning (cont.)

5. Planning for the individual development of and ways to retain key employees.
6. Identifying emergency positions without successors.
7. Planning for positions that cannot be filled internally.

A diverse group of smiling people of various ages and ethnicities, including a woman with a wheelchair, a man with a beard and glasses, and a woman with a red scarf. The image is overlaid with a semi-transparent dark grey layer containing text.

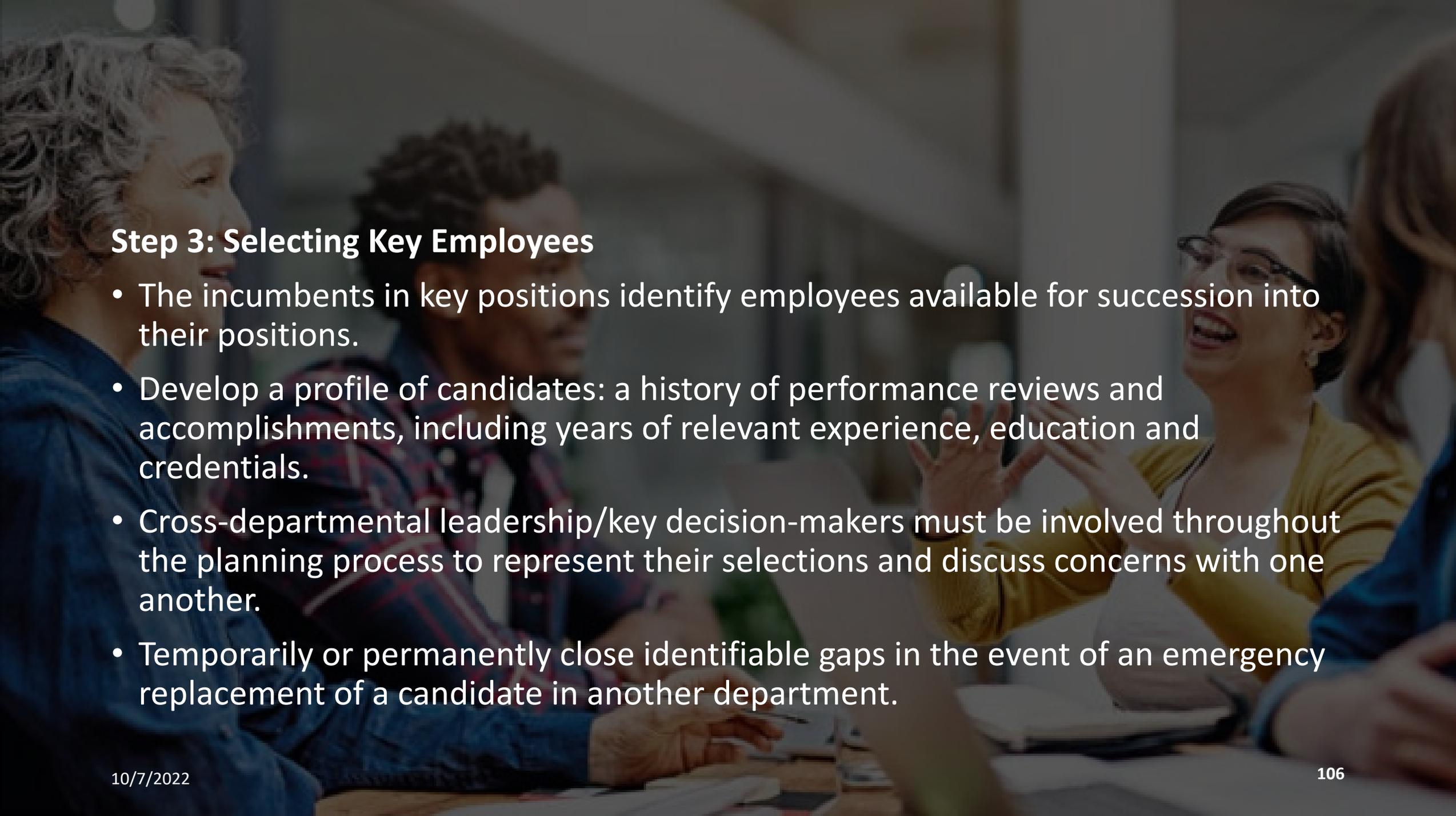
## Step 1: Identify Legal and Diversity Issues

- When positioning employees for succession, avoid “like-me” approaches.
- Top-performing organizations rely on diverse workforces and leadership.
- Discrimination laws require inclusion of all qualified employees regardless of race or gender.

## Step 2: Establishing Present and Future Leadership Roles and Objectives

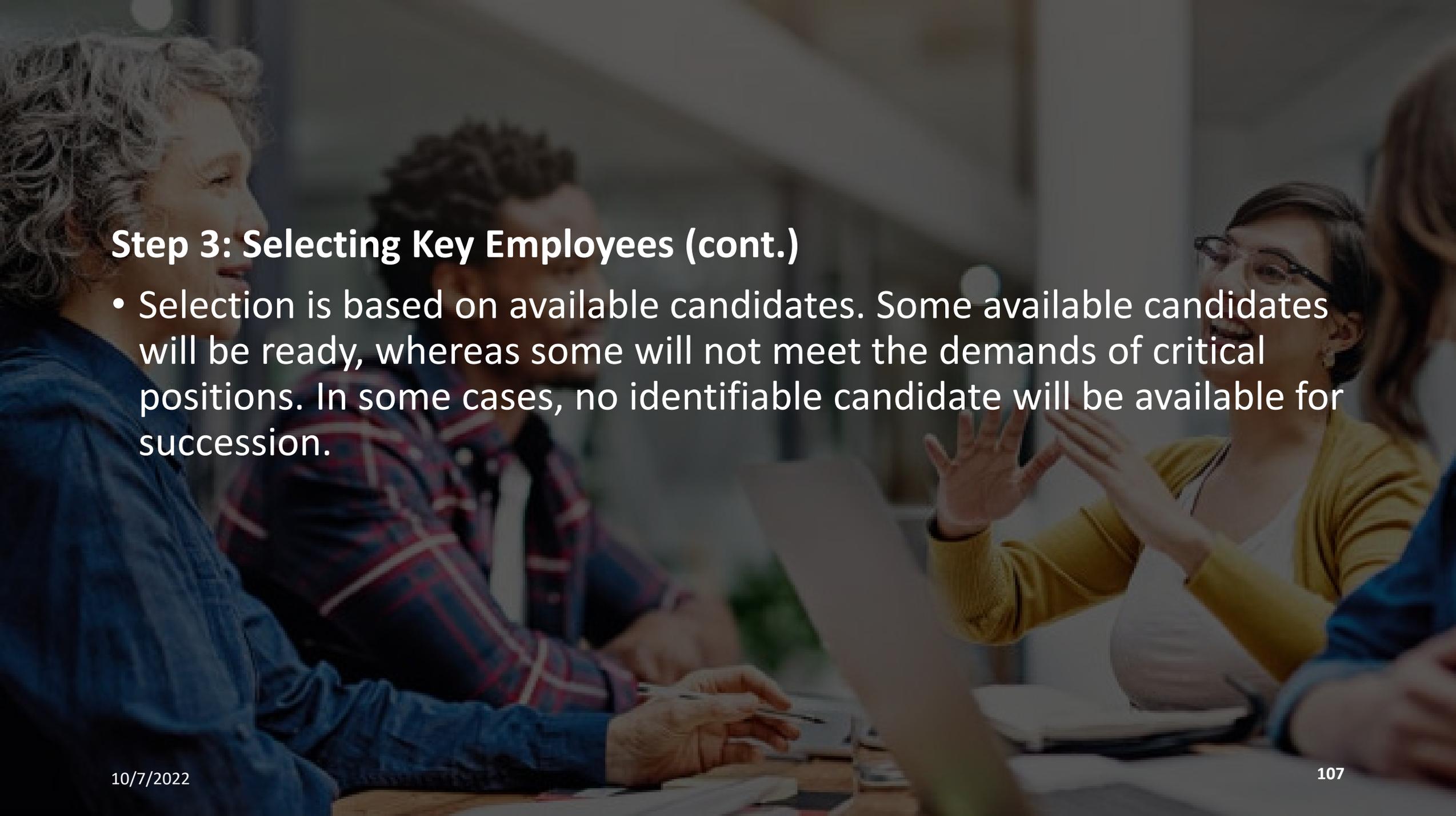
- Ask questions to assess what tomorrow's school district and roles may look like:
  - How will the state of schools and the economy today affect the business operations of the next one to five years?
  - Which operations are critical to the future of the district?
  - Will workload change?
  - Will staffing levels change?
  - What skills and abilities will be needed?





### Step 3: Selecting Key Employees

- The incumbents in key positions identify employees available for succession into their positions.
- Develop a profile of candidates: a history of performance reviews and accomplishments, including years of relevant experience, education and credentials.
- Cross-departmental leadership/key decision-makers must be involved throughout the planning process to represent their selections and discuss concerns with one another.
- Temporarily or permanently close identifiable gaps in the event of an emergency replacement of a candidate in another department.



### Step 3: Selecting Key Employees (cont.)

- Selection is based on available candidates. Some available candidates will be ready, whereas some will not meet the demands of critical positions. In some cases, no identifiable candidate will be available for succession.

# Employee Performance Evaluation

By signing and submitting Employee Performance Evaluation, complete and all information provided is true and accurate and no misrepresentation. I understand that falsifications, representations from consideration to this position. I hereby authorize previous employers for verification, conduct a background check and record.

Full legal name	Last Name
Home Phone	
Street	
E-mail Address	City
Education	
Highest school grade	
Do you have a high school diploma or GED?	
Number of years of work	Degree Received
and Location of	
Education	

## Evaluate the Work, People and Potential

- What work is being done?
- How is it being done?
- What kinds of people do it best?
- Identify potential successors and positions without successors.

## Step 4: Evaluating the strengths, weaknesses and readiness for succession in key employees.

- Once you identify candidates for succession and the skills required for current and future succession, you can use assessment tools to determine skill deficiencies that may presently exist.
- Approaches include:
  - 360-degree surveys.
  - Leadership evaluations by an independent third-party consultant.
  - Existing performance review information and feedback from management.



## Step 5: Planning for the Individual Development and Retention of Key Employees

- Create action plans for developing strengths and reducing weaknesses.
- Common action plans include:
  - Leadership development programs and skill-specific educational programs, such as finance for nonfinancial managers.
  - Internal mentoring program.





## Develop a Plan to Train and Mentor Employees

- What gaps were uncovered when analyzing the work and people needed for the future and evaluating potential?
- Determine current supply and anticipated demand.
- Internal employees should be provided with an Individual Development Plan (IDP) to narrow gaps between what the individual does now and what they must do in the future to function at a higher level of responsibility.

## Step 6: Identifying Emergency Positions without Successors

- Emergency positions are those in which no successor is available or no successor with developmental potential exists.
- When a succession plan has a vacancy, the organizational operations may be at risk in the event of a departure.





## Step 7: Planning for Positions That Cannot Be Filled Internally

- If no successor exists, the district will need to consider external recruitment strategies and develop a recruitment plan, and in the interim, consider cross-departmental succession opportunities.
- This situation can be beneficial in that it allows the employer to bring fresh and diverse talent into the district.



## Keeping the Plan Current

- How will the plan be kept current?
- Develop a recurring time frame, whether semiannually or annually.
- Determine the effectiveness of the existing plan.
- Determine whether the current plan still meets the organizational objectives.
- Determine whether the candidates have changed, and make necessary adjustments in the plan.
- Assess and develop new candidates.

# BENEFITS



## Benefits

- Achieves business goals and avoids costly vacancies in Key Positions.
- Risk mitigation / management.
- Controls how and when Key Positions exit.
- Ensures survival, growth and successful operation of the business.
- Gives key stakeholders a voice.
- Builds employee skills and interdepartmental relationships.
- Preserves and maximizes community interest.
- Reduces uncertainty / enhance stability.
- Provides strategic options from which to choose.

# EMPLOYMENT LAW



Benefits

Skill

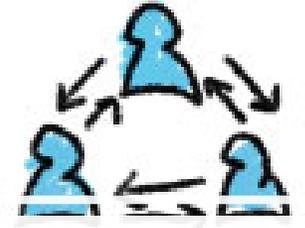
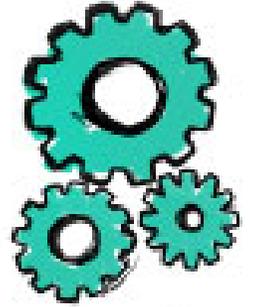
Promotion

Career



COMPENSATION

WORKING HOURS

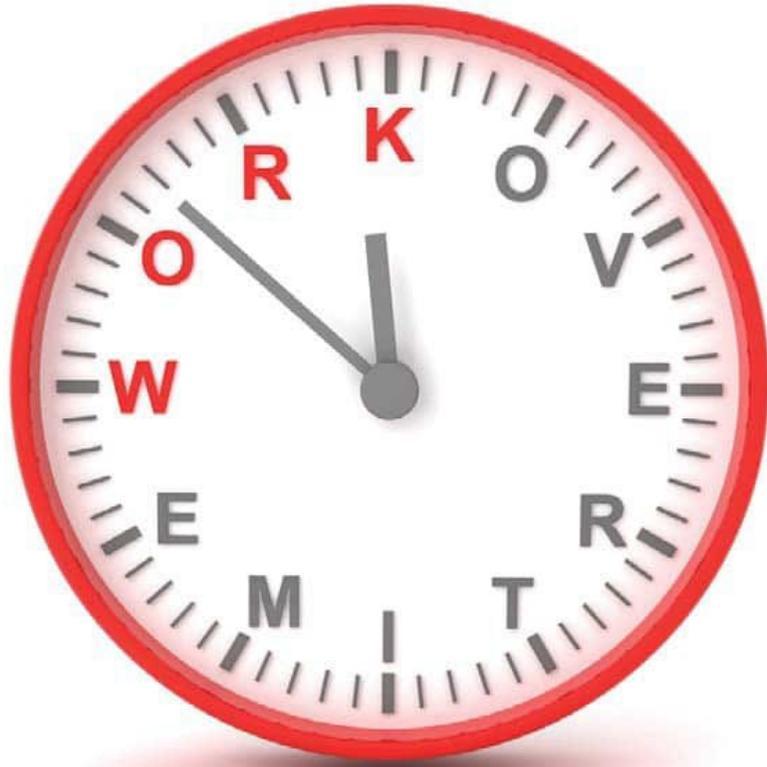


## Major Laws and Regulations



Bonus

AGREEMENT



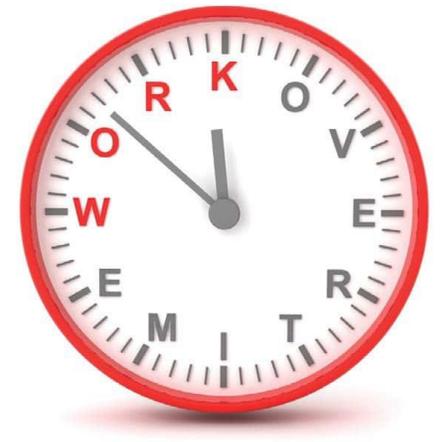
# FLSA Fair Labor Standards Act

# FLSA

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## Created in 1938 to establish regulations for:

- Minimum Wage
  - As of 2018, minimum wage = \$9.25, 2019 = \$9.45, 2020 = \$9.65
- Number of hours which may be worked in a standard workweek.
  - 40 (See Department of Labor Fact Sheet #22 for what constitutes “Hours Worked”)
- Equal Pay
  - Prohibits gender based discrimination.
- Overtime Pay
  - Requires employers to pay at least time and a half to covered nonexempt employees who work in excess of 40 hours per week.
- Record Keeping
  - Every employer must keep certain records for each nonexempt worker.
- Child Labor
  - Minimum age requirement for youth to be employed outside of school hours (nonagricultural = 16, agricultural = 14).



# Exempt vs. Nonexempt Summary

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## Exempt:

1. Do not need to track time.
2. Do not get paid for overtime.
3. Regularly supervisor and have management responsibilities (i.e. hiring / firing authority and delegation of assignments).
4. Often exercise independent judgment with regards to matters of significance.
5. Are paid a salary.

## Nonexempt:

1. Must track time.
2. Do get paid overtime.
3. Does not supervise or have management responsibilities.
4. Do not exercise independent judgement regarding tasks that have a substantial impact on the business.
5. Are typically paid hourly.



# The Three Exemption Tests

---

## **Salary Level / Basis:**

Is the employee compensated on a salary basis at a rate greater than \$684 per week (\$35,568 annually) ?

## **Job Duties:**

Is the employee's primary duty the performance of office or non-manual work directly related to the management or general business operations of the employer or the employer's customer?

## **Discretion and Independent Judgement:**

Does the employee's primary duty include the exercise of discretion and independent judgement with respect to matters of significance?

***Each position must pass all three tests in order to be considered exempt.***



# Sample of Common Exemption Categories

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1. Executive
2. Administrative
3. Professional
4. Computer/Technology
5. Outside Salespersons
6. Highly Compensated Employees



	Current Regulations
<b>Salary Level / Basis</b>	\$35,568 (annually), \$684 (weekly), \$17.00 (hourly)
<b>Highly Compensated Employees Total Annual Compensation Level</b>	\$107,432
<b>Automatic Adjusting</b>	Every 3 years
<b>Bonuses</b>	Up to 10% of standard salary level can come from non-discretionary bonuses, incentive payments, and commissions, paid quarterly.
<b>Job Duties Test</b>	Is the employee's primary duty the performance of office work related to the general business operations of the employer or the employer's customer?
<b>Discretion and Independent Judgement Test</b>	Does the employee's primary duty include the exercise of discretion and independent judgment with respect to matters of significance?

# Freedom of Information Act (FOIA)

- What is this?
  - Law of disclosure.
  - What information is protected?
- What does this mean?
  - Upon proper notice, requires the disclosure for inspection or copying most public records.
  - Predates email, texting, “tweets,” cell phones and other modern communication equipment.
  - Does not require the district to create reports or projections which did not exist prior to the request.



# What is the timeline?

- One person in the district designated to respond.
- If you are unsure, obtain legal counsel.
- You have five days to reply, but can extend to ten if needed.
- If denying a request state a reason (i.e. student names and addresses).
  - Provide a right to repeal your denial.
- Keep all requests and responses on file for one year.
- You can charge for employee time and for copies to assemble a response.
  - Advise the person in advance.
  - May request up to 50% in advance for a large request.



# It is important to remember why FOIA exists

- Transparency is important.
- Can you use a FOIA request to your advantage?



# EEOC

## Equal Employment Opportunity Commission

---

- What does this mean?
  - Laws prohibiting workplace discrimination.
  - Investigates complains based on race, color, national origin, religion, sex, age, disability, etc...
  - Stems from the National Civil Rights Acts of 1964.
    - In Michigan, it is the Elliot Larson Civil Rights Act.
- What is the purpose?
  - Prevent discrimination in hiring decisions.
  - Prohibits harassment based on the protected classes mentioned above.





# HARASSMENT

## **Sexual Harassment Title VII, Civil Rights Act of 1964 (Elliot Larson Civil Rights Act)**

### Definition

- Prohibits harassment based on the protected classes mentioned previously.
- Harassment or assault?
- Quid pro quo versus hostile work environment.
- Preventive Measures
  - Anti-Harassment Policy.
  - Address issues immediately and thoroughly.
  - Communicate actions and results.
  - Maintain confidentiality when possible.



# ERISA

## Employee Retirement Income Security Act

- What does this mean?
- What is the purpose?
  - Establishes a minimum standard for pension plans in private industry.
  - Provides rules on the federal income tax effects of transactions associated with employee benefit plans.
  - Enacted to protect the interests of employee benefit plan participants.
    - Requires disclosure of financial and other plan information to beneficiaries.
    - Establishes standards of conducts for plan fiduciaries.
    - Provides remedies and access to federal courts.

# Public Employment Relations Act (PERA)

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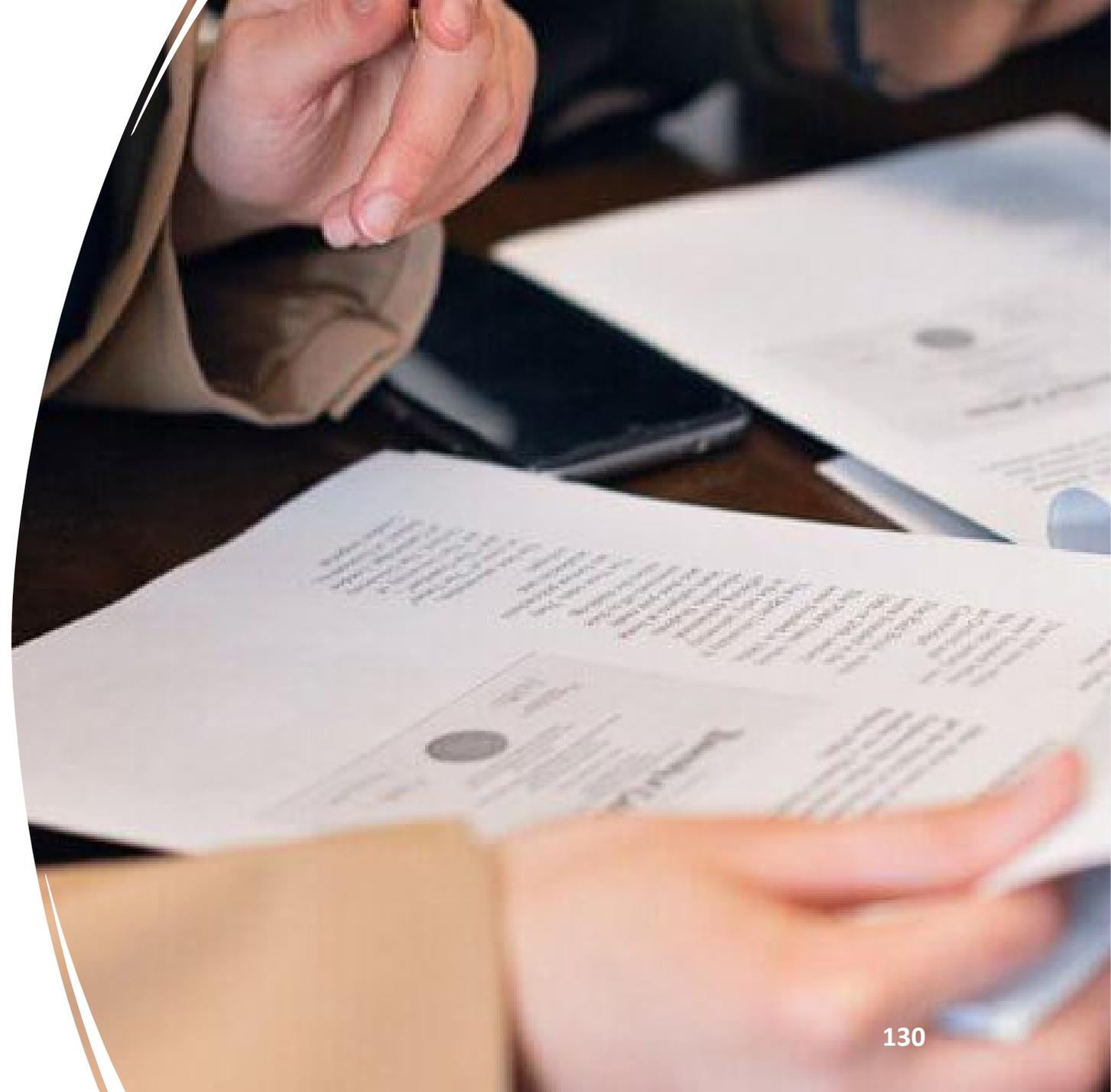
- Mandates a public employer must bargain collectively with representatives of its employees who have been selected by a majority of the employees in an appropriate unit.
  - Can be voluntarily recognized—typically a union.
- Can request information that must be compiled by the employer so the union can prepare or continue to bargain.



# PERA Revisions 2011-2012

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- Added broad authority to Emergency Managers.
- Prevents automatic step increases and makes employees responsible for costs in maintaining benefits.
- Prohibits retroactive pay.
- Authority to decide on inter-governmental agreements rests sole with BOE.
- Right to Work.



# FMLA

## Family Medical Leave Act

---

- Circumstances
- Medical certifications
- FMLA
  - Federal statute that applies to employers with 50 or more employees.
  - Provides healthcare coverage for 12 weeks in a year when the employee is off work for a qualifying event.
  - Unpaid.
  - Must have worked 1,250 hours in previous 12 months.
  - May be taken intermittently.
  - May use calendar, fiscal or rolling year.
  - Employer has the right to run FMLA leave concurrent with sick leave, but not with workers comp.

10/7/2023



# FMLA Qualifiers

- Incapacitation due to pregnancy, prenatal medical care or child birth.
- To care for a child after birth, placement for adoption or foster care.
  - Does not require a biological or legal relationship (2010 Wage and Hour Division clarification).
- To care for the employee's spouse, son, daughter, or parent who has a serious health condition.
- For a serious health condition that makes the employee unable to perform the employee's job.
- Military Family Leave.



# Americans with Disabilities Act (ADA)

- Employee or employer may initiate (usually starts with a request for an accommodation from employee).
- Employer asks for medical certification of the disability.
- Investigate the concern using an Independent Medical Exam (IME).
- Employer determines what is a “reasonable accommodation”.
- If the condition cannot be reasonably accommodated, result may be leave or disabled permanently—which may result in a lawsuit filed by employee.



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# Workplace Safety

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- Before a claim occurs:
  - Train supervisors and employees.
  - Praise / celebrate safety.
  - Ask MIOSHA or a safety consultant to do a practice audit or conduct a training.
  - Listen for issues.
  - Talk to your employees.
  - Add a mandate to report a workplace injury in your Handbook.



# INDEPENDENT CONTRACTOR

VS

# EMPLOYEE



## Employee or Independent Contractor?

### IRS standards:

- Behavioral: Does the company control what and how the work is done.
- Financial: How worker is paid, on payroll (W2) or invoiced (1099).
- Type of Relationship: Written contract, subject to personnel policies, on site or remote?
- Does the person have a company like an LLC and provide similar services to others?
- Why is this important?

**Thank you for your participation!**

**THANK YOU!**

**Todd Surline  
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