

The 7th Annual

JEFFERSON FORUM

Jefferson
Regional
Foundation

Embracing Transformation

HELD VIRTUALLY THROUGHOUT THE
MONTH OF MAY 2021

Thank you for joining! The meeting will begin at 1pm.
Due to the high volume of participants, please remain muted with
your video off. This session is being recorded.

**Please rename yourself –
Full Name and Organization other participants can see!**

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Embracing Transformation

**Transforming Work – People Practices
in the New Normal with tHRive**

Intro by Mary Phan-Gruber

CEO, Jefferson Regional Foundation



Transforming Work – People Practices in the New Normal with tHRive

Prepared by Christie Cawley, Eileen Wickett, &
Joel Skerlong | tHRive

May 11, 2021



Christie Cawley |
LinkedIn

Christie Cawley is a Senior Partner, Executive Consultant, Certified Coach & Master Trainer at Center for Victory, a global talent management consulting firm and is also the President of CCK Consulting LLC/tHRive-People Practices for Nonprofits (www.thriveHR.work). Additionally, Christie has a BA, Applied Psychology, is an active member of the Society of Human Resource Management (SHRM), International Coach Federation (ICF), a Certified Master Trainer with Predictive Index Worldwide, Inc. and a member of Vistage Trusted Advisors.

With more than 25 years of professional experience, Christie specializes in leadership development, talent management and business performance using science and the Predictive Index suite of tools to help clients overcome their most challenging human capital and hiring dilemmas. Christie has extensive experience a human resources leader, non-profit executive, executive coach and business consultant, and supports organizations through significant change implementation and coaches for successful execution and sustainability.

Non-Profit Experience: ACTION Housing Inc., AIR, Allegheny Conference, Allegheny Health Choices Inc, Carriage House Inc., Center for Theater Arts, Center for Women, Children's Hospital of Pittsburgh, Construction Junction Inc., CISPAC-Communities In Schools Pittsburgh Allegheny County, DePaul School for Hearing & Speech, Easterseals of Michigan, Family House Inc., Family Means (Wisconsin), Global Links, Hillman Family Foundations, Humane Animal Rescue, Juniata College, Methodist Church Union, NAMI Keystone, National Council of Jewish Women, Pittsburgh (NCJW), P3R, Peoples Oakland, PRC- Pennsylvania Resources Council, Regional Housing Legal Services, The Forbes Funds, Trying Together (formerly PAEYC), University of Pittsburgh (Department of Athletics & Student Life), YMCA Central Virginia, YMCA Greater Dayton Area, and YMCA Greater Pittsburgh.



Eileen Wickett |
LinkedIn

Eileen Wickett is a seasoned senior HR professional with a passion for problem solving, talent development, and creating impactful interventions and solutions. She earned an M.B.A. from the University of Pittsburgh and a B.A. in English and Secondary Education from Kent State University. She has continuously maintained SPHR and SHRM-SCP certifications and is also a Certified Facilitator for DDI (Development Dimensions International). Additionally, Eileen served as the former Interim Director for United Way Pittsburgh 2-1-1 program and serves as Practice Advisor, tHRive.



Joel Skerlong |
LinkedIn

Joel Skerlong currently serves as a Project Administrator for tHRive and CCK Consulting LLC and also operates a remote consulting practice for Talent Management Agencies within New York City. Joel specializes in analyzing the components of business strategy, implementing value additive procedures within people operations practices, and developing/driving performance management initiatives. Joel recently obtained his certification as a PI Practitioner for the Predictive Index Worldwide, Inc.

Agenda

- **Transformational Work Planning**
- **Employment Regulations**
- **Culture**
- **Resources / Q&A**

Transformational Work Planning

- What has changed in your organization?



Polling Question #1

What has changed?

Accountability

Pay Practices

People

Location

- Remote, Hybrid, In-person

Interactions

- Team, Communication, Trust

Jobs

- Tasks, Goals, Skills, Organization Structure

Stressors

- Job Security, Financial, Health, Social (Isolation), Political, DEI

Categories of Consideration to Guide the Changes

Policies & Procedures

- **Return to Work Checklist**

Job Design & Job Descriptions

- **Job Design PDF**

Workflow & Team Interactions

- **Engaging Remote Teams Article**

Client Demands & Expectations

- **Will impact the above three categories**

Guiding Principles for Organization Design to Determine an Optimal Remote Work Strategy

- Environment to deliver optimal service
- Structure to get best results from team members
- How to keep employees engaged as well as productive?
- What worked well when your organization was fully remote? What did you miss?
 - *Consider things like social interactions, collaboration, informal learning, sense of teamwork, overall performance and productivity*

What roles are better suited for remote work?

- Independent tasks (super-intense collaboration NOT needed)
- Experienced workforce
- Employee desire

Special Considerations for the Hybrid Model Approach

- Be transparent about how you determined the organizational structure
- Consistent core hours for meetings
- Flexibility

Special Considerations for the In-Person Model Approach

- Workplace preparation
- Revisiting onboarding practices



Regulations to Consider

- ADA
- EEOC
- FLSA
- FMLA

Breakout Session #1

- **Groups 1 – 5 | How do I manage through a hybrid approach? How do I handle new team members?**
- **Groups 6 – 10 | How does DEI play a role in your hybrid approach?**
- ***All Groups | What are the challenges and potential solutions?***



Employment Regulations



Key Employment Regulations

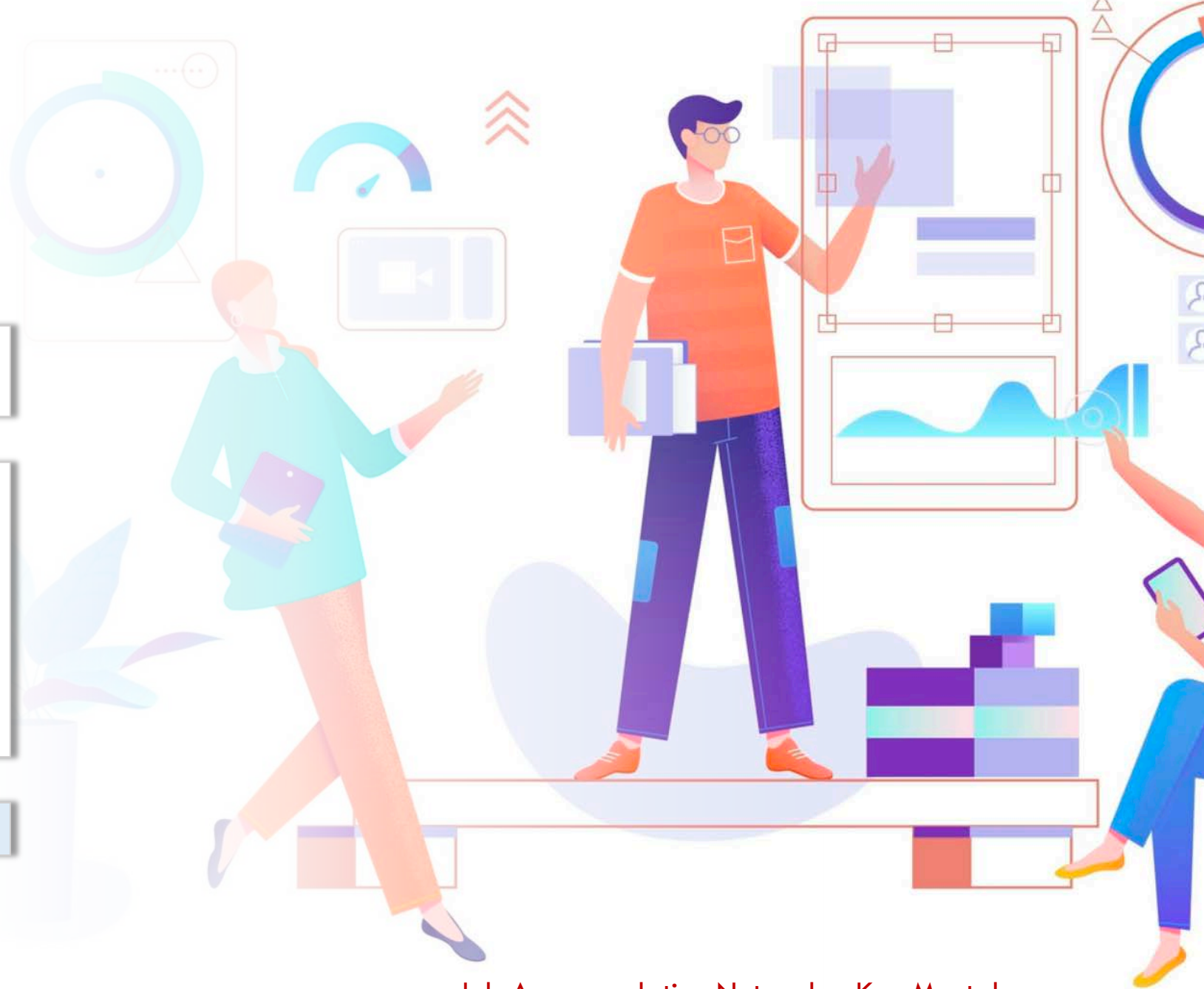
HR Regulation	Eligibility Based on Head Count	Notes
<u>ERISA (Employee Retirement Income Security Act of 1974)</u>	All	<ul style="list-style-type: none"> Department of Labor - Federal law that sets minimum standards for most voluntarily established retirement and health plans in private industry to provide protection for individuals in these plans
<u>Equal Pay Act of 1963</u>	All	<ul style="list-style-type: none"> The Equal Pay Act of 1963 is an amendment to the Fair Labor Standards Act which prohibits employers from discriminating between men and women by paying one gender more than the other "for equal work on jobs the performance of which requires equal skill, effort, and responsibility, and which are performed under similar working conditions."
<u>FLSA (Fair Labor Standards Act)</u>	All	<ul style="list-style-type: none"> Last updated January 2020 - covers federal Minimum Wage, Overtime Eligibility. Administered by Department of Labor
<u>HIPAA (Health Insurance Portability and Accountability Act)</u>	All	<ul style="list-style-type: none"> Health Information Privacy Administered by HHS (Health and Human Services)
<u>OSHA (Occupational Safety and Health Administration)</u>	All	<ul style="list-style-type: none"> Administered by Department of Labor. OSHA's mission is to ensure that employees work in a safe and healthful environment by setting and enforcing standards...
<u>ADA (Americans with Disabilities Act)</u>	15+	<ul style="list-style-type: none"> The Attorney General has responsibility for publishing regulations implementing the requirements of title II (state and local government services) and title III (public accommodations and commercial facilities) of the ADA.
<u>Pregnancy Discrimination</u>	15+	<ul style="list-style-type: none"> Administered by Equal Employment Opportunity Commission (EEOC)
<u>FMLA (Family Medical Leave Act)</u>	50+	<ul style="list-style-type: none"> Administered by Department of Labor
<u>Affordable Care</u>	50+	<ul style="list-style-type: none"> The employer shared responsibility provisions (also known as "pay or play") require applicable large <u>employers</u> ("ALEs")—generally those with at least 50 full-time employees, including full-time equivalent employees—to offer affordable health insurance that provides a minimum level of coverage to full-time employees (and their dependents) <u>or</u> pay a penalty tax if any full-time employee is certified to receive a premium tax credit for purchasing individual coverage on the Health Insurance Marketplace (Exchange).
<u>EEOC</u>	50+	<ul style="list-style-type: none"> Anti-Discrimination, administered by Equal Employment Opportunity Commission. EEO-1 Reporting Requirements
<u>FFCRA</u>	Under 500	<ul style="list-style-type: none"> The Families First Coronavirus Response Act (FFCRA) provides temporary relief to eligible employees affected by the COVID-19 pandemic, contains two laws that provide such relief: (1) a new paid sick leave benefit (Emergency Paid Sick Leave Act or EPSLA), and (2) an expansion of the Family and Medical Leave Act (FMLA)

Scenario – Request for Accommodation / Leave of Absence

- Multiple requests for help and support as a result of mental health needs

1. Policy & Precedent
2. Benefits
3. Job Duties & Accountability
4. Documentation
5. Consideration of Hardship

- **Seek Legal Counsel**



Breakout Session #2

- **Groups 1 - 5 | How should organizations navigate reasonable Leave of Absence and Accommodation Requests for mental health with existing employees?**
- **Groups 6 – 10 | What are some practices that your organization is employing to raise awareness about mental health and reduce stigma in your workplace?**
- **All Groups | *What are the challenges and potential solutions?***





Culture



Polling Question #4 & #5

Sample Employer Pledge *During times of COVID-19*

- I pledge to be **Family Sensitive**.
- I pledge to support **Flexibility for Personal Needs**.
- I pledge to support “**Not Camera Ready**” times.
- I pledge to **Be Kind**.
- I pledge to **Set Boundaries & Prevent Video Fatigue**.
- I pledge to **Take Care of Myself**.
- I pledge to **Frequently Check In** on people.
- I pledge to **Be Connected**.



Transformational Management Style – the 3C's



Confirm

- Job expectations (two-way discussion), work schedule (core hours)
- Performance Goals - define accountability, measure outcomes
- How to work together – be flexible and adaptable

Connect

- Human connection is essential – need to be more deliberate for remote employee(s)
- Virtual Team meetings, space for informal team discussion, virtual team space (open Zoom line)
- Variety of interactions – watch for remote burnout, add in 5-minute breaks between meetings, camera-off meetings
- Display empathy, understand new stressors, be mindful of trust issues/concerns



Coach

- Adapt your style – ask for feedback on how it's going
- Find ways to observe work without detailed monitoring



**Key Manager Skills

- Empathy
- Flexibility
- Accountability
- Listening and Awareness
- Visibility and Transparency
- Trustworthy

Model of Organizational Trust

Model of Organizational Trust



TRUST

- People
- Policies
- Practices
- Values
- Communication
- Expectations
- Engagement

I would like you to think about your workplace practices...but instead of starting with policies, I want you to start with experiences. This will guide our discussion.

- What is the ideal employee experience with our organization?
- What is our philosophy around this?
- How will this possibly change due to covid?

MIT Sloan | Designing Trustworthy Organizations

Breakout Session #3

- **Groups 1 – 5 | What will you pledge to your employees?**
- **Groups 6 – 10 | How do pledges to your employees impact recruiting practices, new hires, & diversity efforts?**
- **All Groups | What are the challenges and potential solutions?**



Next Steps

- Review Themes from today's discussion
- Refer to your Action Plan Worksheet to formulate a plan
- Reach out to peers to inspire your practices
- Visit thrivehr.work for the Webinar PDF, Materials, & Recording
- Boost your HR Confidence Levels!

Additional People Practice Tools & Insights

[8 Areas of Self-Care: Modern Therapy | Modern Therapy](#)

[An Inflection Point for Successful Post-Pandemic Workplaces | CNBC](#)

[Designing the Hybrid Office Podcast | HBR](#)

[Preparing The Workplace For A Post-Pandemic World | Forbes](#)

[The Virtual Work Skills You Need — Even If You Never Work Remotely](#)

[What's Your Organization's Long-Term Remote Work Strategy? | SHRM](#)

[Why Remote Work Doesn't Have to Dilute Your Company's Culture | SHRM](#)

Contact Us



tHRive

People Practices for NonProfits

The Team at tHRive

info@thrivehr.work

Upcoming Forum Sessions

**Keynote: Transforming Your
Mindset, Asset- Framing for Equity**
May 20th, 10 am – 12 pm:

Learn how an Asset Framing
mindset defines people by their
aspirations, not their challenges
with national thought leader
Trabian Shorters.



This Keynote is Co-Sponsored by
Grantmakers of Western PA

Register Up to 24 Hours Prior at www.jeffersonrf.org/forum



Transformational Workshops

Five interactive workshops will be held on different dates throughout May. Please attend as many as you wish.

- **May 14th** Transforming Influence & Policy – Digital Engagement & Govt Funding
- **May 18th** Transforming Community Health – Access & Technology
- **May 24th** Transforming Data – Data as a Tool for Change
- **May 26th & June 4th WAITLIST ONLY** Transforming Equity – Racial Wealth Gap Simulation

Register Up to 24 Hours Prior at www.jeffersonrf.org/forum



Your Feedback is Important to Us!

Complete a 2 minute survey at:

<https://www.surveymonkey.com/r/5W5GRKM>

**Thank you for joining us for the
Jefferson Forum Kick-Off!**

