



New Nonprofit Executive Fellowship

Growing the People and Safeguarding the Mission

Facilitated by Sheila Bravo and Tinesar Priester

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Session 6: Connecting with Stakeholders

- Self Care Check In
- Growing the People
- Mentor Moment: Kevin Smith
- Safeguarding the Mission with Chanta Wilkinson
- Lunch and Closing Thoughts



Self Care Check In

Human Resources

What comes to mind when you think of Human Resources?

What comes to mind when you think of Workforce Management?

What comes to mind when you think of Staff Development?

Human Resources

Human resources is responsible for recruiting, onboarding, training and managing an employee from their job application to final severance. This end-to-end management of employees includes strategies for payroll and benefits administration, upskilling, establishing positive workplace culture, optimizing employee productivity, handling employer-employee relationships, employee termination and more.

Human resource management should not be confused with ***workforce management***, which focuses on strategic planning for the direction of an organization's growth and not on the day-to-day supervision of employees.

Workforce Management

Workforce management is a set of processes employers use to direct staff members to be in the right places at the right times in order to reduce risks and maximize productivity. It's a top-down approach that starts with leadership creating defined strategic goals so that organizations have clear direction as to how future decisions will be made.

Key Aspects of Workforce Management

- Time Management and Scheduling
- Forecasting and Budgeting
- Payroll and Benefits
- Data Reporting on efficiency and effectiveness of training and proficiency
- Compliance and Mitigating Risk
- Recruiting and Applicant Tracking

Staff Development

Employee development — often referred to as professional development or staff development — encompasses **any professional training or continuing education that an employer facilitates in order to support workers in furthering their careers.** Professional development is meant to improve employees' skills and knowledge so they can progress in their overall career path, not just build a skill set for a particular role.

While it's ultimately the individual's responsibility to own their professional development, it's to the employer's benefit to encourage continuing education by ensuring staff have access to both internal and external learning opportunities.

Staff Development or HR?

HR focuses primarily on the immediate and short-term needs of the organization.

True

Staff Development is responsible for managing employee benefits and compensation.

False

One of the primary goals of Staff Development is to enhance employees' skills and knowledge.

True

HR includes activities such as training sessions and career development plans.

False

Staff Development or HR?

Staff Development often collaborates with HR to align training programs with recruitment strategies.

True

HR success is typically measured by metrics such as training completion rates and skill acquisition.

False

Staff Development focuses on long-term employee growth and continuous improvement.

True

HR professionals handle compliance with labor laws and employee relations.

True

Staff Development or HR?

Both HR and Staff Development aim to increase employee engagement and job satisfaction.

True

Staff Development is responsible for recruiting and hiring new employees.

False

Key Things to Remember

Human Resources, Workforce Management, and Staff Development work together

Avoid Prioritizing ***HIRING*** over ***DEVELOPING***

- Hiring is regulation-driven

- Developing is relationship-driven

Incorporate Performance Management

Offer Internal and External Development Opportunities



Discussion

What internal tools can you use to develop employees?

What external tools can you use to develop employees?

Key Things to Remember

Retention is cheaper than recruitment.

What's the # 1 reason people leave? (Forbes.com)

1. No clear career path
2. Stress or lack of resources
3. Health and family matters
4. Work/life balance
5. Money

Orientation *and* Onboarding- Joey Coleman

Orientation: An introduction to an employee's new surroundings and employment activities. It's about simple answers to common "where is" and "how to" questions.

Orientation *and* Onboarding- Joey Coleman

Onboarding: Inviting new employees using a managed, structured series of contacts, designed to create a warm, welcoming experience.

Onboarding is a more robust, comprehensive approach for bringing a new employee into the organization. Onboarding assists and supports the new employee over time so they can develop the skills, knowledge, and attitudes they need to be successful in their role.

[Never Lose and Employee Again](#) by Joey Coleman

Hiring Contractors and Employees

Employees: Under common-law rules, anyone who performs services for you is your employee if you can control what will be done and how it will be done. This is so even when you give the employee freedom of action. What matters is that you have the right to control the details of how the services are performed.

Hiring Contractors and Employees

Contractors: Acts that provide evidence of the degree of control and independence fall into three categories:

- Behavioral: Does the company control or have the right to control what the worker does and how the worker does his or her job?
- Financial: Are the business aspects of the worker's job controlled by the payer? (these include things like how worker is paid, whether expenses are reimbursed, who provides tools/supplies, etc.)
- Type of relationship: Are there written contracts or employee type benefits (that is, pension plan, insurance, vacation pay, etc.)? Will the relationship continue and is the work performed a key aspect of the business?

- [Source: IRS](#)

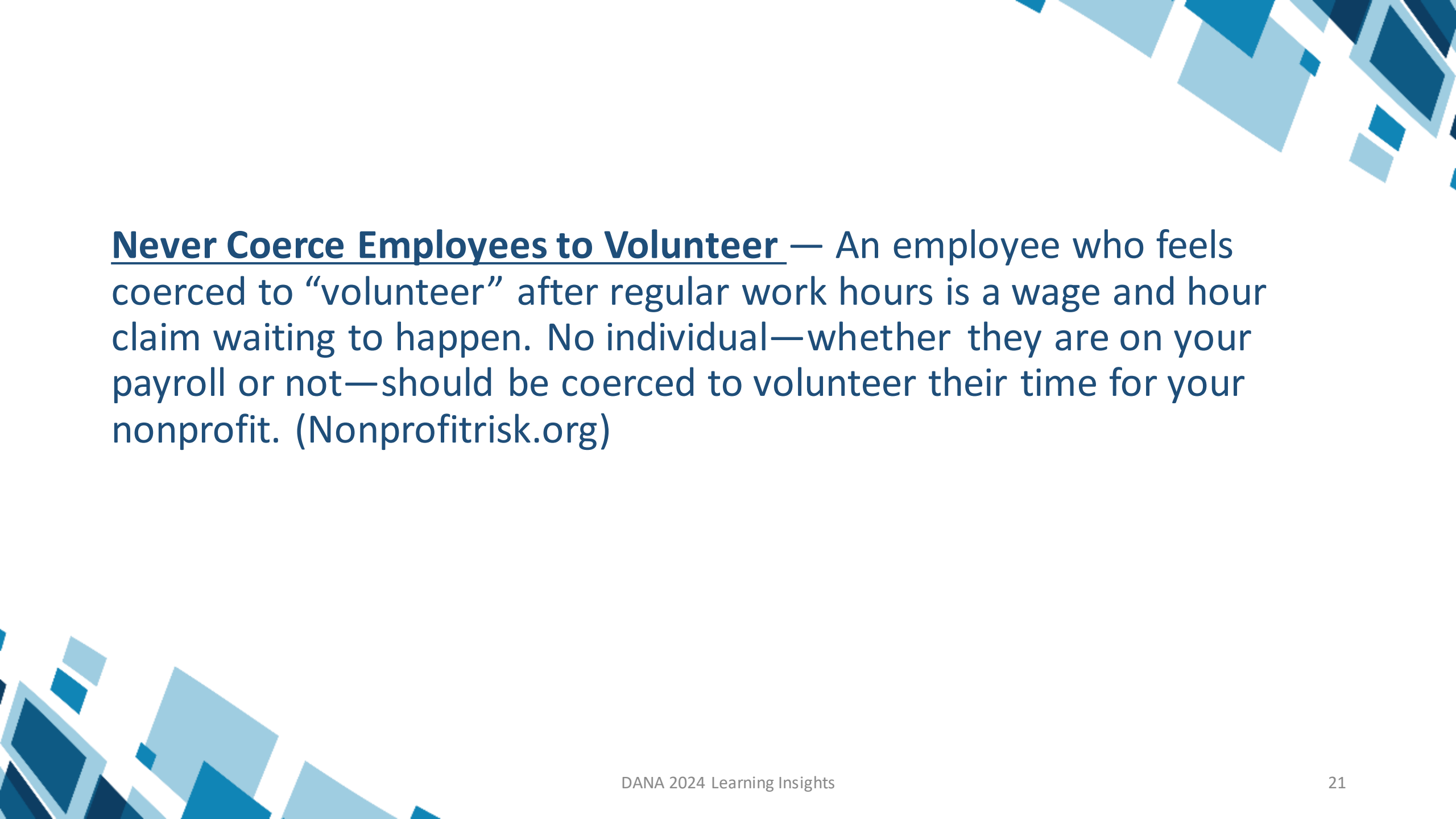
Volunteers

Volunteers: a volunteer is: an “individual who performs hours of service’ for civic, charitable, or humanitarian reasons, without promise, expectation, or receipt of compensation for services rendered.

Can Employees Volunteer?

Yes, but.....

Never Ignore “Off the Clock” Service — Employers who look the other way when nonexempt workers “volunteer” after hours expose their nonprofits to costly wage and hour claims. The nonexempt employee who is content to volunteer today could be an aggrieved plaintiff demanding unpaid wages and penalties six months from now. Keep in mind that it is the employer’s duty (not the employee’s!) to keep track of the hours worked by nonexempt employees and to ensure that compensation practices are FLSA compliant. (Nonprofitrisk.org)



Never Coerce Employees to Volunteer — An employee who feels coerced to “volunteer” after regular work hours is a wage and hour claim waiting to happen. No individual—whether they are on your payroll or not—should be coerced to volunteer their time for your nonprofit. (Nonprofitrisk.org)



Remember the Volunteer Service Rule of Three

“True” volunteers are those who: (1) work toward public service, religious, or humanitarian objectives; (2) do not expect or receive compensation for services; and (3) do not displace any genuine employees. (Nonprofitrisk.org)

Agency Culture

How we handle employees and volunteers reflects the agency's culture.

Agency culture is the set of beliefs and customs that guide your employees' actions. It includes ethics, values, goals, and attitudes that affect every touchpoint—from interpersonal relationships to the end results your stakeholders see.

Mentor Moment: Agency Culture with Kevin Smith



Kevin L. Smith
Chief Executive Officer





Safeguarding the Mission

With Chanta Wilkinson

Considerations in Safeguarding the Mission

- People
- Safety
- Brand
- Unplanned Events
- Leadership Succession
- Institutional Knowledge Transition

Mentor Moment: Safeguarding the mission with Chanta Wilkinson



Elements of Oversight

Internal Controls

- Segregate duties
- Policies Enforced

Insurance Policies

- Risk assessment
- Annually review policies, coverage and deductibles

Investment & Reserve Policies

- Risk guidelines
- Investment Strategy
- Cash Balance Requirements

Spending

- Authorization Guidelines
- Process for Vendor Selection

Risk Mitigation



AN ETHICS AND ACCOUNTABILITY CODE
FOR THE NONPROFIT SECTOR

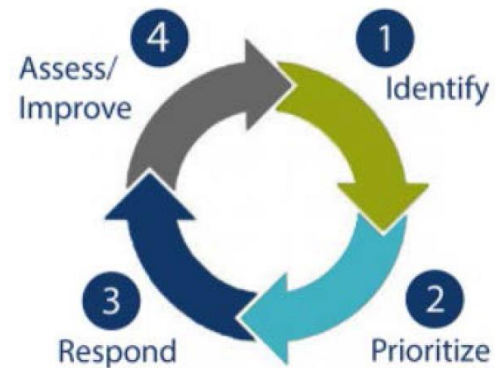
#21 Education Packet
List of Insurance Policies

Independence and Transparency Tips

- Policy and procedure documentation
- 3rd party reviewer of accounting data/financial reporting
- Audit vs Review – when to make changes
- All volunteer boards and independent oversight
- Evaluation
- What to share with the public

Risk Management

“a discipline for dealing with the possibility that some future event will cause harm. It provides strategies, techniques, and an approach to recognizing and confronting any threat faced by an organization in fulfilling its mission.” Alliance for Nonprofit Management.



Ted Bilch, Risk Alternatives



Lunch Break



Moving Ahead

Any areas you feel stuck?

Contact Sheila or Tinesar

Developing Action Plans

Conduct an Assessment

- Leadership: 360 model or several other types of assessments

- Team:

 - [Five Dysfunctions of a Team](#)

 - [16 Personalities](#)

- Organizational

 - DANA Board Excellence Assessment

 - Standards for Excellence Org Assessment

 - [Diversity, Equity, & Inclusion Culture](#)

Staying Charged, Focused, Empowered

- Remain Connected
- Reflections of Success
- Personal Board of Advisors
 - Willing to offer guidance
 - Different types of expertise
 - Different personality types
- Taking time for self-care
- Continue Professional Development
 - Executive Coaching
 - DANA Board Chair/CEO
 - DANA Accelerator
 - Successor training

Reflections on this Program

- What did you learn about yourself?
 - What were some helpful items you are incorporating into your work?
 - What did you wish we covered?
 - Did the format work?
-
- Please complete this assessment to help us improve