

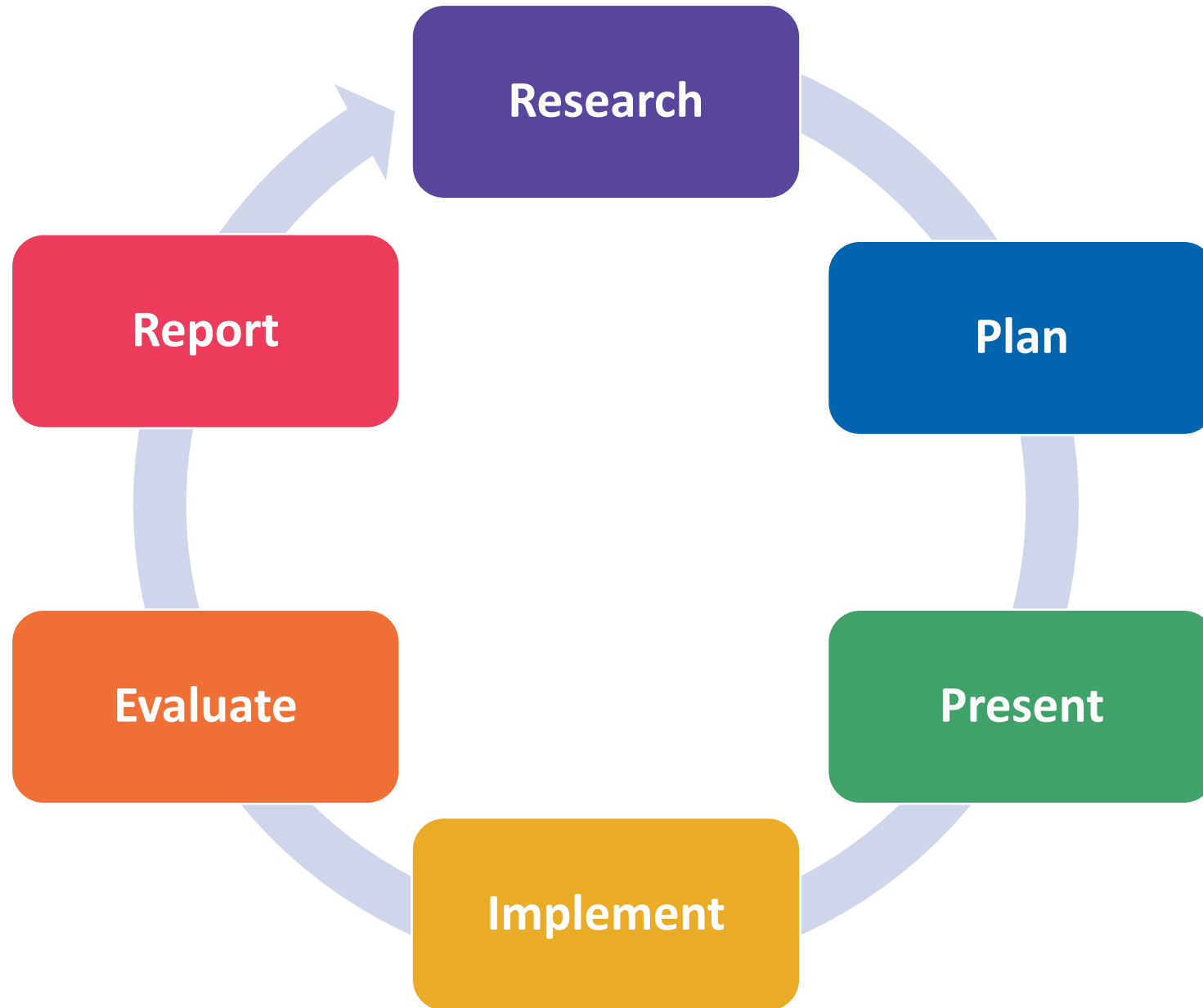


# **HR & Grading Policies**

July 10, 2018

Facilitated by: Wendy Schmitt

Great Lakes Regional Director | National Program Manager



# Session Goals

- Quick review of Human Resources Department Tasks
- Organization & Time Management
- Company Culture
- Recruiting & Onboarding
- Training & Development
- Employee Benefits
- Employee Evaluations & Assessment
- Plan for Student Evaluation & Grading Policies
- Compliance & Other



# Human Resources

- What is Human Resources?
- What activities will this department be responsible for?
  
- Document, document, document!
- Compliance
- Risk Management



# Hands On: Resources in the VE Portal

Go to: [portal.veinternational.org](https://portal.veinternational.org)

Username:

[testfirm@veinternational.org](mailto:testfirm@veinternational.org)

Password: Enterprise18



# Hands On: Explore the VE Portal

- Curriculum Tasks
- Human Resources
  - Tasks
  - Reference Files

The screenshot displays the VE Portal interface. At the top, the word "Portal" is prominently displayed in purple. Below it, a navigation bar contains icons and labels for "Firm Admin", "Firm bank account", "Wholesale Marketplace", "Store Manager", "Firm Directory", and "Teacher bank account". On the left side, a vertical menu lists various curriculum categories, with "Human Resources" highlighted in green. The main content area is titled "Human Resources Tasks" and contains a list of 18 tasks, each with a blue link. A mouse cursor is hovering over "Task 8: Creating an Employee Performance Evaluation". At the bottom of the page, a copyright notice states: "This curriculum is copyright protected, and may not be reproduced without consent in whole or in part in any form."

VE Curriculum

Human Resources

Home

VE Brief

Orientation

Accounting & Finance

Administration

Design / IT

**Human Resources**

Sales & Marketing

Communications

Personal Finance

Competitions & Rubrics

Submittal Forms

Taxes

Business Plan

E-Commerce Website

Trade Shows

Tasks

Reference Files

### Human Resources Tasks

- [Orientation to Human Resources](#)
- [Task 1: Establishing Attendance Procedures](#)
- [Task 2: Compiling an Employee Database \(Class Roster\)](#)
- [Task 3: Creating an Organizational Chart](#)
- [Task 4: Creating a Welcome Presentation for New Employees](#)
- [Task 5: Creating or Updating the Employee Manual](#)
- [Task 6: Creating Professional Development Workshops](#)
- [Task 7: Creating Company Forms \(Templates\)](#)
- [Task 8: Creating an Employee Performance Evaluation](#)
- [Task 9: Developing a Letter of Reprimand, Dismissal, Demotion, Undesired Transfer, Etc. \(Bad-News Messages\)](#)
- [Task 10: Writing an Effective Letter of Appreciation or Commendation](#)
- [Task 11: Establishing Procedures to Implement the 401\(K\) Plan](#)
- [Task 12: Implementing the 401\(K\) Plan](#)
- [Task 13: Preparing a Company Presentation on Ethics](#)
- [Task 14: Establishing Conflict Resolution Policies](#)
- [Task 15: Analyzing and Evaluating Letters of Application and Resumes](#)
- [Task 16: Preparing a Newsletter Article](#)
- [Task 17: Developing a Recruitment Strategy and Presentation](#)
- [Task 18: Preparing For Transition](#)

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# Organization & Time

## Weekly Department Meetings

- Weekly Department Meetings

	Monday	Tuesday	Wednesday	Thursday	Friday
Admin	<b>Meeting</b>	Work	Work	Work	<b>Meeting</b>
Acct	Work	<b>Meeting</b>	Work	Work	Work
Sales	Work	Work	<b>Meeting</b>	Work	Work
HR	Work	Work	Work	<b>Meeting</b>	Work

- Idea: if departments “need” you outside their designated meeting slot, they have to pay a “consultation fee”!

## Employee Database/Directory

- Consider confidentiality!
- Research:
  - What information should be kept on file?
  - How long should it be kept?
  - What access do employees have to their own files & records?
- Use as a checklist for grading/other
- (Task 2)



# Organization & Time

## Attendance System

- Utilize attendance system in Portal
  - Print daily report for facilitator
  - Use to track days off
- Interface with Accounting for Payroll

## Tracking Time Worked

- Options for recording time worked:
  - Sign in (paper or electronic)
  - Time Clock
  - Web based time tracking apps (Quickbooks?!)
  - Other?





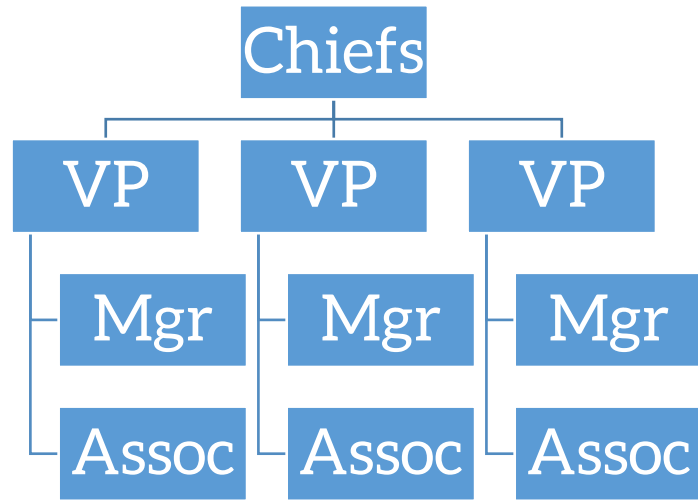
# Organization & Time

## Organization Chart

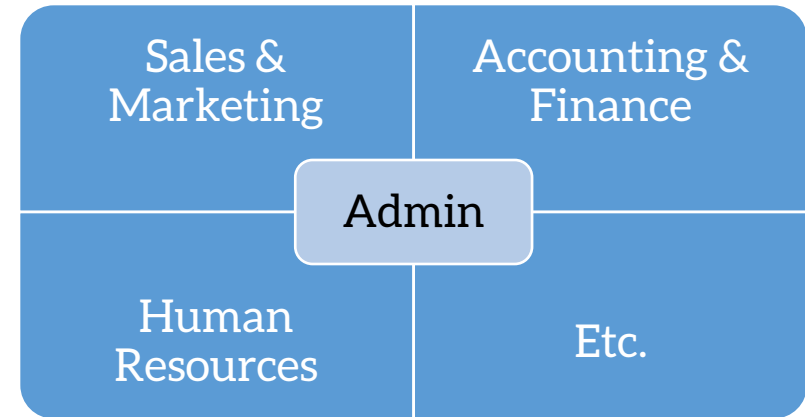
- Dependent on initial hiring process
- Did facilitator create the organization chart?
  - Possibly modify once year is underway
- Were employees hired for a department or for a particular job?
  - If by department, who decides how positions will be filled?



# Sample Organizational Structures

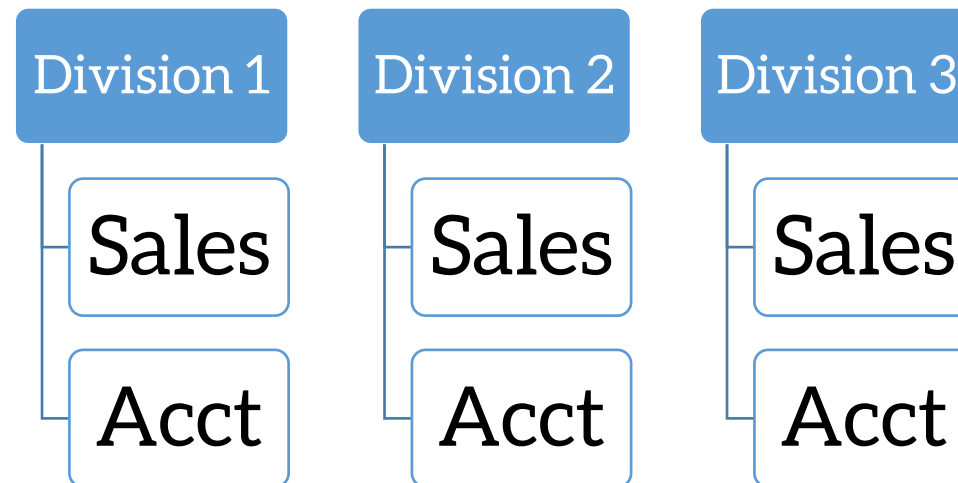


Functional/Hierarchy



Matrix/Team-based

## Divisional/Large firms



# Resources

- Society for Human Resource Management
  - Resources & tools for all things HR
  - [www.shrm.org](http://www.shrm.org)
- BLR—Business and Legal Resources
  - Compliance tools for HR professionals
  - [www.hr.blr.com](http://www.hr.blr.com)
- Business Management Daily
  - Business news, insight, and advice
  - [www.businessmanagementdaily.com](http://www.businessmanagementdaily.com)
- HR Help Board
  - HR resources
  - [www.hrhelpboard.com](http://www.hrhelpboard.com)
- Local HR professionals (mentors)



# Communication within Organization

- Work-specific email address (vs. school email)
- Utilize Google Calendar (or similar) – share with ALL staff
  - Include deadlines, school events, PD days, etc.
  - Managed by HR
- Employees must “call in” / report absences to supervisor
  - Email or otherwise, copy to Facilitator
- Set up department Group Chats using Remind.com (or other)
  - Include Facilitator in each group
- Utilize an online tracker, such as Trello.com, to organize and track deadlines, projects, etc.
  - Idea: have students review Trello, and research alternative resources





# Company Culture

# The Google Influence

- Google's Company Culture:
  - Create fun office challenges
  - Get moving
  - Celebrate special occasions
  - Make time for fun
  - Occasionally get out of the office
- Netflix Vacation Policy
  - “there is no policy or tracking”
- Incubator spaces, such as WeWork
- Steelcase – functional, flexible workspaces



# Employee Manual & Company Forms

## Employee Manual

- Include all policies and procedures in the Employee Manual
- Manuals should stand up in a court of law
- Updates should continue throughout the year

## Company Forms

- Utilize company branding – work with Design/IT
- Forms should stand up in a court of law
- Crossover opportunities with other tasks & departments



# Hands On: Explore Student Work

1. Go to: [competitions.veinternational.org](https://competitions.veinternational.org)
2. Set up an account, register as a “Visitor”
3. Find the competitions below and select “Judge”

## Review Competitions:

- Employee Manual





# Company Forms

- Attendance Sheets (HR Task 1)
  - Spreadsheet to track PTO , sick days, etc.
- 401(k) forms
- Field Trip Permission Slips/Other
- Grading forms
- Employee Evaluation forms
- Purchases/Trades made
- Professional Development attendance forms
- Evaluation Task Sheets (HR Task 8)
- Meeting Schedules (Admin Task 7)
- Meeting Minutes (Admin Task 7/Reference Files)
- Presentation Schedules
- Calendars
- Business Plan Task Schedules
- Trade Show Task Schedules
- Annual Report Task Schedules



# Company Forms

- Letters of :
  - Warning/Reprimand
  - Dismissal
  - Demotion
  - Transfer
  - Appreciation
  - Commendation
- (HR Task 9)



# Conflict Resolution

- Process for reporting problems and resolving conflict at an early stage
  - Sexual harassment
  - Nondiscrimination
  - Reporting unethical behavior (Task 13)
  - Whistleblower





# **Recruiting & Onboarding**

# Welcome Presentation & Onboarding

- Create a PPT or video presentation about the firm for new hires (HR Task 4)
  - Can be used mid-year for semester adds
  - Utilize during orientation for 2+ year firms
  - Nifty idea: [1 Second Everyday](#) or [Insta-Mash](#) etc.
- New-hire paperwork
  - Set an internal deadline for submissions
- Review & Acceptance of Employee Manual
  - Signed form stating they have received manual/training – include in HR file



# Recruitment Strategies

- Develop an application for incoming employees
- Create a presentation or video to recruit new employees (Task 17)
  - Present to feeder classes during scheduling
  - Nifty idea: [1 Second Everyday](#) or [Insta-Mash](#) etc.
- Host a Grand Opening, Open House or [Year-End Celebration](#)
  - Prospective students
  - Yearbook, student newspaper or bloggers
  - Parents, teachers, counselors
  - Local business people, Chamber of Commerce, business associations
  - Local media



# Recruitment Strategies

Get prospective students involved

- Job Shadows
  - Employees invite other students to shadow them
  - Coordinate a sign-up with feeder class/other teachers
  - Could be set up as an “internal” field trip
- Tent/Trade Show Booth during lunches
- Host recruitment events in your “office” before school, during lunches, or after school or concurrent to high-traffic events (incoming freshmen, school open house, etc.)





# **Training Resources**



# Professional Development

- Suggested topics
  - Workplace Safety
  - Proper dress and behavior in the workplace
  - Using appropriate telephone and email communication techniques
  - Internet and email usage and policies
  - Employee Manual overview
  - Consider aligning topics with standards you must teach





# Employee Benefits

# Benefit Options

## 401(k) Plan

- Establish & implement a 401(k) plan
  - Find firms that offer 401(k) programs
  - Resources: 401(k) or investment advisors
- Idea: tie this to Stock Market Game

## Group Benefits Administration

- Employee Insurance Benefits:
  - Medical
  - Dental
  - Vision
  - Disability
  - Life





# **Employee Evaluations & Assessment**

# Formal Evaluation Options

- Self-evaluations
- Manager evaluations
- [Nuapps](#) archived example



# Weekly Activity Logs

- Employee Activity Log
- VP Activity Log
- Department Activity Wall
- Shared Google Doc



# HR Coordinated Grading Activities

- Work portfolio
- Personal finance transactions
- Evaluations
- Attendance/participation
- Daily sign-in sheets
- Daily work logs
- Self evaluations
- Manager evaluations

Utilize student generated  
Employee Checklist to help YOU post grades!



# Other Grading Ideas

- Fall
  - Interview Process Artifacts
  - Business Plan Contribution
  - Trade Show Prep &/or Involvement
  - Elevator Pitch
  - Sales Presentation
- Weekly
  - Weekly Logs
  - Weekly Articles
- Monthly
  - Portfolio assignments
  - Personal Finance
  - Reflections
  - PD
  - Newsletter Articles
- Spring
  - Department Manuals
  - Annual Reports







**Compliance & Other**

# Other HR Activities

- Risk Management
  - Workplace Safety
  - Workers' Compensation
- Compliance
  - ADA
  - EEOC
- Employee health & wellness
- Sustainability
- Performance improvement
- Corporate image
- Firm/Employee Newsletter
  - Employee news
- Employee of the Month
  - Or other employee recognitions



# Year End Ideas

- Voluntary or involuntary separation
  - Layoff letters
  - Employee resignation letters
  - Continuation of benefits (COBRA)
  - Severance packages
  - Plans for remaining money in bank
- Employee Awards Ceremony
  - Student generated “awards” – include inexpensive personalized statues



# Human Resources: Key to Creating a Successful Workplace!





**Q & A**



**Thank you!**

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