



Annual Conference San Mateo May 2015

Our annual conference was held in San Mateo with over 40 HR & Training professionals in attendance. We received very positive feedback from the attendees and are already planning our next year's event so stay tuned!

The conference provided for fun networking opportunities as well as informative sessions. Whether you were able to make it to the conference or not, we wanted to provide you with a summary of the topics and insights from throughout the event. We hope this information will be beneficial to you.

Applying the Law to Complex HR Challenges by *Cristina Miller of Styskal, Wiese, Melchione*

In this very informative legal update, we reviewed the following:

California's New Sick Leave Law (Healthy Workplaces, Healthy Families Act of 2014):

- Who is covered
- Posting requirements
- Recordkeeping requirements
- Frontload, accrual and carryover rules
- Rules for using existing PTO plans to meet the sick leave obligation

Amended CFRA Regulations:

- Length of service requirement
- Reinstatement rights
- Notice requirement
- Coordination of CFRA and PDL

Joint Employer Liability:

- Expansion of liability for temporary employees
- What does strict liability mean (hint: CU knowledge does not matter)

Disability Leave and Reasonable Accommodation:

- Top claims in 2014 were for retaliation, disability (mental and physical), and unfair treatment due to race/color.

Employer Obligations for Data Breach:

- HIPPA breach notification obligations
- California Confidentiality of Medical Information Act
- Best Practices

Onboarding Best Practices Workshop by *Dolores Trevino – VP of Staff Development at 1st United Services CU*

Delores led an outstanding presentation and participative workshop on the onboarding experience. Delores reminded us that preparation is key!

- Have Everything Ready
- Give an Office Tour
- On the Job Training
- Give them small and manageable tasks
- Assign a mentor
- Get paperwork out of the way early

The group reflected on their “first day” experiences and shared best practices that work well in their organizations.

Group 1

- ✓ Being prepared
- ✓ Paperwork in advance
- ✓ Variety of presenters
- ✓ Introductions before training
- ✓ Peers take you to lunch
- ✓ Class first, then work, then back
- ✓ Incorporate stories, make own
- ✓ Tour building
- ✓ Week @ teller line & call center
- ✓ Fun & Interactive
- ✓ Create “Life Plan”
- ✓ Mock Interviews “Member Transactions”

Group 2

- ✓ Tour and personal intros
- ✓ Notice to staff – intro new hire (w/ picture)
- ✓ Workstation ready (name)
- ✓ Lunch with supervisor/HR
 - culture demo/discussion
- ✓ Hand holding/transition support from HR
- ✓ Gift/welcome pack with card
 - Dress code, directions
 - Marketing swag
- ✓ 2 days orientation then
 - Teller school, lending school, etc with HR/Training and SME (stipend paid, train the trainer) → (2 weeks)
- ✓ Intro video with senior management
 - Culture
 - Each department description
- ✓ Intranet – org chart, employee photos & department assignment

Group 3

- ✓ Welcome Package
 - Dress code

- goodies with logo
- ✓ Business Cards prior
- ✓ Clarity on culture “Who We Are”
- ✓ Shop for corporate wear
 - \$
 - Logo wear

Group 4

- ✓ 1-day with CEO and other CU speakers
- ✓ Pre-hire packet with info
- ✓ CEO presentation w/ career path discussion
- ✓ Day 1 Training on start date
- ✓ Associates come to HQ for training

Group 5

- ✓ Free Logo “swag”
- ✓ Checklist for “mgr’s” – 90 days of what you should do for employees
- ✓ Meet/greet tour
- ✓ Group sessions – senior execs/VP managers interact with all levels of management)
- ✓ Ongoing/personal resource
- ✓ Free lunch
- ✓ Create a master training plan for reference/consistency
- ✓ Log into systems/check credentials
- ✓ Internal evaluation “consultants”
- ✓ Training Specialist in Branches with New Hires
- ✓ 90 day “New Hire Survey” – reports to VP HR and CEO

Group 6

- ✓ CEO Meet & Greet
- ✓ CEO takes out to lunch
- ✓ Buddy takes to lunch
- ✓ Current manager takes to lunch
- ✓ Email to IT – ready to go on Day 1
- ✓ Send flowers to new hire
- ✓ Send care package i.e. marketing material, notebook, pen
- ✓ Onboarding survey @ 120 days (retention tool)
- ✓ Initial Development Plan – checklist
- ✓ Welcome package:
 - Example 1: where to go 1st day
 - Example 2: what to wear
 - Example 3: when/time

Building a Total Rewards Strategy by *Philippe Asselin of Balanced Comp*

Philippe’s expert presentation focused on strategies for attracting and retaining top talent. He discussed various motivators, the economic season, and encouraged us to know and understand our company culture – both from an internal and an external perspective. The group shared thoughts and experiences with the new “Era of transparency” with websites such as GlassDoor.com and Yelp. Do YOU know your credit union’s reputation among your potential candidates?

Inspiring Employees through Development Programs by *Brandi Stankovic, Ed.D., Mitchell, Stankovic & Associates*

Brandi's energizing presentation inspired the attendees to recruit with enthusiasm! The attendees analyzed their "elevator pitch" and identified the most important keys to success when recruiting and retaining top talent. The participants identified their MVPs and discussed ways for helping each person to get more of what they value. The groups focused on effective leadership characteristics for "blasting targets", creating a support network and "feeding forward" – a positive, upbeat way to help yourself and others define success.

Techniques for Building High Performance Teams by *Dr. Mark Mallinger, PhD - Professor of Applied Behavioral Science, Graziado School of Business and Management, Pepperdine University*

Dr. Mallinger's interactive presentation demonstrated the frameworks to guiding learning. The characteristics of high performance teams are:

- Established goals
- Skills aligned with goals
- Process in place to attain goals
- Heightened accountability
- Opportunities for professional development

His message reminded us to enhance the communication process by using Advocacy and Inquiry, a concept described by Peter Singe in *The Fifth Discipline*.

Fostering an Innovative Organizational Culture

This informative and interactive panel discussion provided helpful advice from some of our most experienced peers, *Kyle Johnson - Director of Risk Management & Compliance at Boulder Dam Credit Union, Heidi Mankoff - Director, Culture & Talent Development at Xceed Financial CU, and Rebecca Nixon - VP of Human Resources at San Mateo Credit Union.*

The panel experts shared experiences with inviting, encouraging and inspiring an innovative culture within their organizations. Several participants also shared thoughts, ideas and best practices that work well in their credit unions.

Improving HR and Training Efficiencies through Automation by *Mary Leonardi, PHR – Director, Executive Search at O'Rourke and Associates*

Mary engaged the audience with ideas for streamlining the HR and training functions through automation. The participants shared ideas for moving from a very paper-intensive to an electronic environment.

And Let's Not Forget About Our Award Winners!

Each year, HRD Network members have the opportunity to recognize their peers by nominating them for one of three prestigious awards in the Human Resources and Employee Development fields. The winners for 2015 were:

HR PROFESSIONAL OF THE YEAR is an award recognizes an HR Professional who has excelled in the Human Resources field. The winner this year was **Courtney Lynch** from Xceed Federal Credit Union. Congratulations Courtney!

SUZANNE CARLISLE HRD NETWORK TRAINER'S SCHOLARSHIP is an award that recognizes a Trainer who has shown excellence in educational initiatives. The award recipient receives a scholarship for \$500 to be used towards admission to training and development events. The winner this year was **Delores Trevino** with 1st United Services Credit Union. Delores was also a speaker at the conference. Congratulations Delores!

PATTI REED EDUCATIONAL SCHOLARSHIP was created to provide small credit unions (less than \$100M in assets) with access to training and professional development opportunities. The award recipient receives a scholarship for \$500 to be used towards admission to training and development events. The winner this year was **Kaiperm Diablo Federal Credit Union**. The credit union's CEO, **Michael Stremme** was in attendance and accepted the award.