

2023 BOSTON

Best of HFAs: Human Resources

Participants

- **Susan Delgado**, Director, Human Resources | Pennsylvania Housing Finance Agency
- **Heather Hart**, Vice President of Human Resources | District of Columbia Housing Finance Agency
- **Callie Quinlan**, Administrative Officer | Wyoming Community Development Authority
- **Rachel Shaw**, Director of Human Resources and Risk Management | Wyoming Community Development Authority

2023 BOSTON

Care Beyond Compensation: Holistic Approach to Employee Benefits

DC Housing Finance Agency

Heather A. Hart, Vice President, Human Resources







Benefits

IMPORTANT TO ATTRACTING AND ENGAGING TALENT

77%

APPLICANTS CONSIDER
BENEFITS PACKAGE
WHEN ACCEPTING A JOB

83%

EMPLOYEES INDICATE A
BENEFIT PACKAGE
INFLUENCES DECISION TO
STAY AT CURRENT EMPLOYER

UPDATED STRATEGIC GOALS

DCHFPA incorporated employee's wellness, employee retention, and recruitment into its strategic goals

DCHFPA prioritizes employee's holistic wellness and overall well-being to help build an inclusive workplace culture.

TASK AT HAND:

DCHFA Human Resources' department attempted to create a benefit package that would be innovative, relevant and impactful to employee's in the new world – post COVID

SURVEY:

To better understand the needs of our workforce, HR conducted an internal benefits study as well as researched and examined external data including benefit reports, HR trends on turnover, retention and recruitment.



DCHFA'S BENEFIT STRATEGY

PROVIDE BENEFITS THAT ARE FLEXIBLE IN
OPTIONS WITH A HOLISTIC APPROACH
FOCUSING ON PHYSICAL, FINANCIAL, MENTAL
AND SOCIAL WELLNESS OF ALL EMPLOYEES

ENHANCED BENEFITS
&
NEW BENEFITS



ENHANCED BENEFITS



ENHANCED BENEFITS

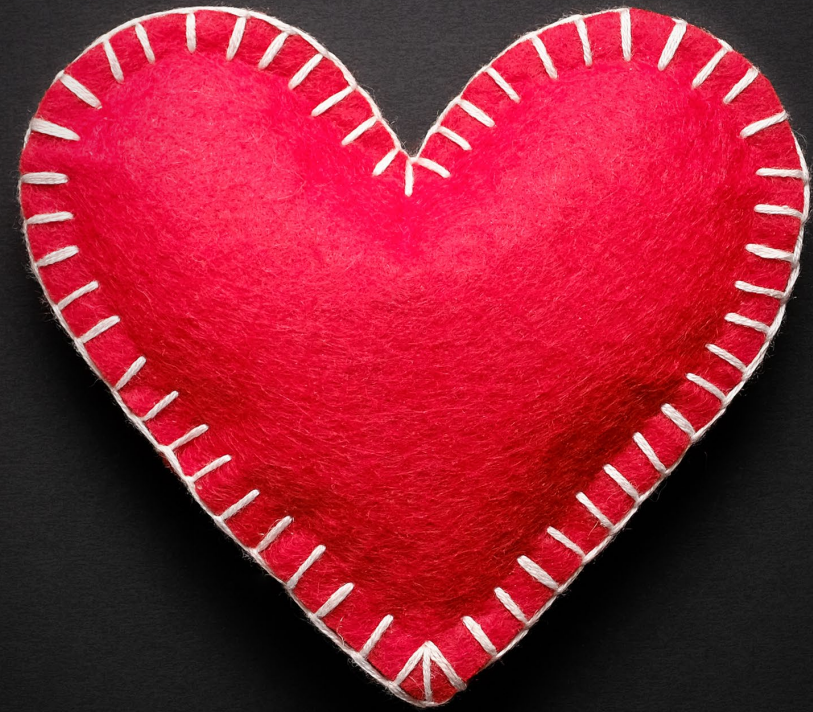


WORK FROM HOME

“THE MOST
VALUED BENEFIT
WAS FLEXIBILITY
RELATED TO
REMOTE WORK”



PHYSICAL
WELLNESS



WELLNESS PLATFORM

NUTRITION CLASSES

WEBINARS



ON DEMAND
MEDIATION

HEALTH
NEWSLETTER

ON DEMAND
FITNESSES

hidrate sparkTM



Challenge Stats

YOUR INDIVIDUAL STATS



3

Total Volume (gal)



18

Bottles Saved



0 / 15

Daily Goals Met

ALL PARTICIPANTS STATS



88

Total Volume (gal)



539

Bottles Saved



30%

Avg. Daily Goals Met

Exclusive Trophies



DC Housing Participant



DC Housing Victor



Flawless DC Housing

Challenge Settings

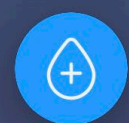
How Points Are Calculated



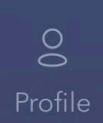
Home



Social



Bottles



Profile

HIDRATE PLATFORM





DCHFA HEALTH & WELLNESS

WELLNESS STIPEND

FINANCIAL WELLNESS



Flexible Employer Match

- Employees can direct and/or allocate unused Employer Match Dollars from retirement plan to their student loan account or 529 College Savings Funds, or a combination of both
- Provide a Flexible Match up to 7%
- Benefit predominately used by Millennials and Generation Z (31%)



529 College Savings Plan



Student Loan Debt

VACATION LEAVE CONVERSION



MOST WIDELY USED BENEFIT AMONG STAFF REGARDLESS OF GENERATION
OR FAMILY CIRCUMSTANCE

Convert “*Vacation*” hours to financial wellness accounts



Student Loan Debt



Emergency Savings Account*



457 Retirement Plan



Vacation

MENTAL WELLNESS



VACATION LEAVE CONVERSION

BENEFITS OF VACATION

- DECREASED EMPLOYEE BURNOUT
- IMPROVED PRODUCTIVITY
- LOWER STRESS LEVELS
- BETTER MENTAL HEALTH

WHY DON'T EMPLOYEES MAXIMIZE PAID TIME OFF?

- FINANCIALLY CANT AFFORD VACATION
- NOT SURE OF WHEN TO TAKE LEAVE

ANSWER:



*B*enefit
ites

SMALL, CLEAR,
PROACTIVE
COMMUNICATIONS
AROUND DCHFA'S
BENEFIT OFFERINGS

KEY POINTS

- Take time to ensure benefits are thoughtfully selected to suit your people and culture
- Great ideas don't have to break the bank. Simple inexpensive measures can be remarkably effective and memorable.
 - PAID TIME OFF BIRTHDAYS
 - FREE TEA & COFFEE
- Empathy




Pennsylvania Housing Finance Agency

SMART PERFORMANCE Management

Presentation - 2023



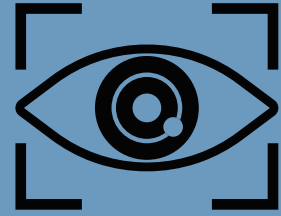


The Challenge

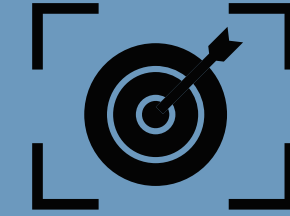
As the Agency made a shift from remote work in response to the Pandemic of 2020 to an ongoing hybrid workforce as a way of normal business operations, it became evident that the previous way of managing performance was not aligned with that model.

Important to support employees and managers with improved tools to be able to consistently communicate expectations, to promote teamwork and to support employee professional development goals.

The Innovation



The new approach creates a forum for conversation around expectations between the manager and the employee and promotes leadership, teamwork, and mentoring.



Creating more individualized plans with measurable outcomes is designed to make it easy to determine if the expectations are being met and makes the evaluation less subjective.

SMART Goal Concept

An employee and supervisor will work together to create a series of three to five SMART goals for the upcoming year

Specific

What will be accomplished? What actions will you take?



Measurable

What data will measure the goal? How much? How well?



Achievable

Is the goal doable? Do you have the necessary skills and resources?



Relevant

How does the goal align with broader goals? Why is the result important?



Time-Bound

What is the time frame for accomplishing the goal?



Changes to SMART Performance Management

Outcomes-Based

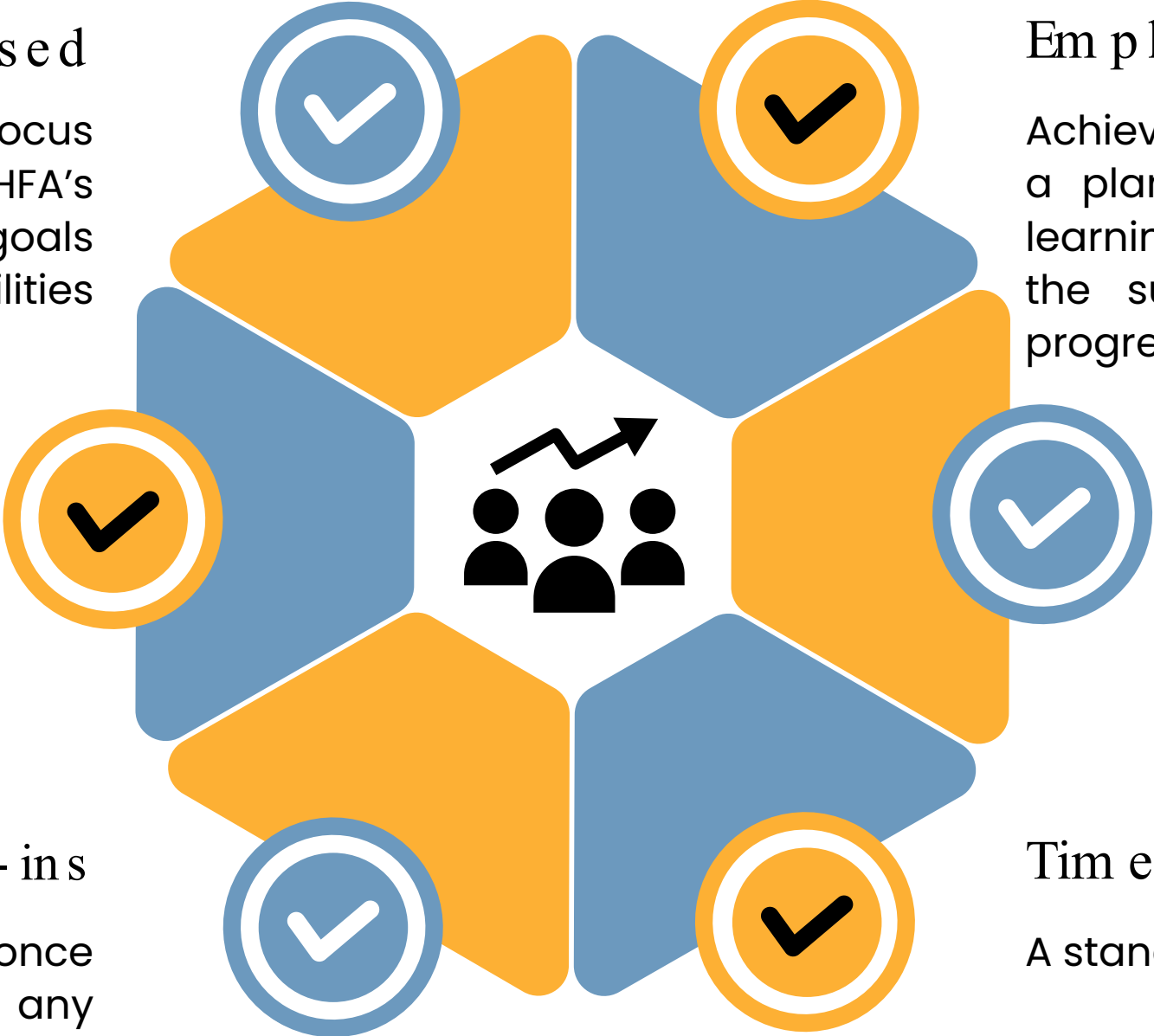
Traditional performance evaluation systems focus solely on competencies or specific behaviors. PHFA's approach focuses on creating tangible goals related to an employee's roles and responsibilities and professional development aspirations.

Ratings Reduced from 5 to 3

PHFA's previous evaluation form included five rating categories. In the new performance management, there are three ratings to simplify the rating process (Not Met, Met, and Exceeded).

Baseline and Quarterly Check-ins

Supervisor and employee must meet regularly once goals are established. The key element to any effective performance management process is ongoing dialogue. The baseline meeting is also used as an opportunity to review position job descriptions annually and update if needed.



Employee Development Plan

Achieving short-term and long-term goals requires a plan that identifies both formal and informal learning opportunities. Once a plan is developed, the supervisor and employee will monitor the progress being made throughout the year.

Encouragement

Encouraging and training employees how to be their own advocate and take more accountability for their professional goals while teaching managers how to coach and encourage employees (and how to have the "difficult" conversations).

Time Process

A standard calendar year schedule for all employees

Performance Management Implementation

- PHFA worked with a partner consultant (Dering) to establish the timeline, communications, and training.
- Employees learned the basics of the new process and tools via on-line training as a pre-requisite to in-person training that was provided to all employees and managers.
- Training was conducted from late August through the end of September 2022
- Goals were to be established in the month of October 2022. Employees and managers to draft goals by October 31, 2022.
- Time for coaching, feedback, and updates to goals before they started in January 2023.








- Coaching available to managers/supervisors to provide guidance as the new process was being implemented.
- Ongoing communications provided to all levels of the organization throughout the transition.
- There were scheduled forums for employees and managers to ask questions.
- Transition from the previous review form to the new is gradually done over the 2023 calendar year (2023).
- Allows the Agency time to practice and better understand the new process before fully rolling it out in 2024



Important Stages Of Performance Management

All employees created their baseline goals by January 2023 and the Agency has completed the first quarter check-ins. Each of the quarterly check-ins are less about an employee's performance over that period and more about the dialogue. An employee is evaluating the progress made on a particular goal up to that point. The self-evaluated status and comments are meant to begin a conversation with the supervisor who will offer feedback and suggestions, if required. Employees and managers assess the goals with one of the following status designations

-  Did Not Start
-  Behind Schedule
-  On - Target
-  Ahead of Schedule
-  Complete

Benefits

- Open and honest communication between supervisors and employees regarding job responsibilities, expectations, performance standards and business goals.
- Provide the opportunity to review the period of evaluation and to discuss both positive and negative aspects of employee performance and to acknowledge meritorious performance.
- To enhance overall job performance with subsequent improvement of organizational effectiveness.
- To encourage employees to identify issues of concern, put forth new ideas, and assist in goal setting for themselves, the unit, and the Agency.
- Provides the opportunity to redefine the requirements for the next evaluation period, as necessary.
- Creates a forum for the supervisor and the employee to discuss opportunities for growth and identify training needs





PENNSYLVANIA HOUSING FINANCE AGENCY

Thank You

For Your Attention

Susan Delgado, Director of Human Resources



2023 BOSTON

Culture After COVID



Rachel Shaw

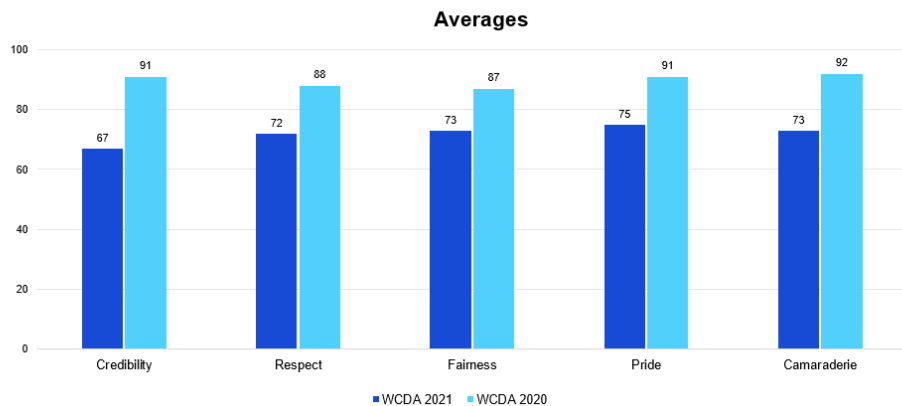


Callie Quinlan



The Challenge

Comparisons by Dimension

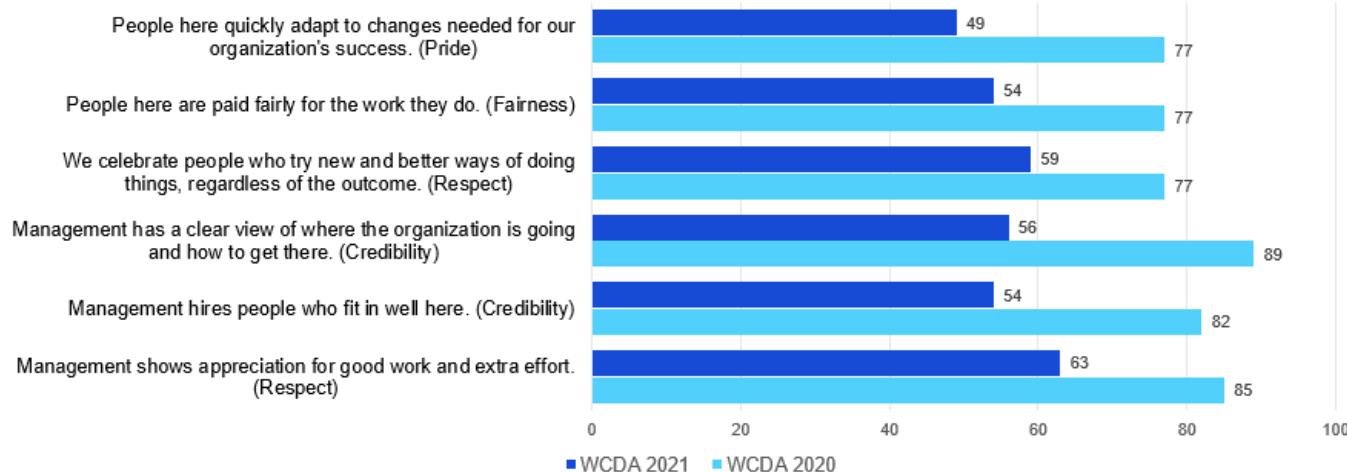


Flight Risk
22%

Benchmark: 4%

22% Flight Risk Employees are disconnected and not invested in staying long term

17% At Risk Employees are not experiencing a great workplace and do not feel that they are in a performance driven environment

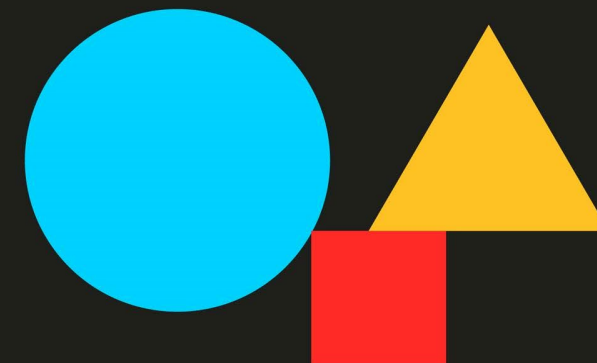


Recognition



Recognize the good.

awardco



Happy Employee Appreciation Day!

Happy National Employee Appreciation day, Petel!

The foundation of affordable housing in Wyoming has been built on WCDA since 1975, and the foundation of WCDA is you. Thank you for all you do every day to help our community; the teamwork inside this building is what makes our mission a reality. As a token of our appreciation for your work and to help celebrate your day, a gift from us:

15 Points

You can redeem these points at any time on our AwardCo platform.

Sincerely,
Wyoming Community Development Authority

[Log Into Your Account](#)

Website: wcda.awardco.com

Purpose drives values. Recognizing values drives behavior. Behavior builds culture.

Purpose-Driven Organizations

Purpose-driven companies outperform the stock market by 42%*.

Values are more than words on a wall.

Communicating, exemplifying, and incentivizing values is essential to building purpose.

Type	Amount	Disbursable Increments
Peer to peer (5 per emp)	\$1,125	\$5
Manager to staff	\$1,775	\$25
Non-Milestone Anniversary	\$225	\$5
Birthday	\$225	\$5
Wellness	\$250	\$5
New Hire	\$50	\$10
HR Other	\$500	Discretionary

“I was struck by how this encourages the team to celebrate wins big and small and to recognize the great folks at WCDA in real-time.” -Michael Holliday, newly onboarded team member of WCDA

TriMetric

Engaging Through Communication

A multi-faceted analysis that measures

- Individual behaviors
- Communication style
- Motivators
- Emotional intelligence
- Skills and acumen



Coffee with an Executive

"The Executive Team has increased their involvement with WCDA Staff in the most recent 2 years. Their schedules and workloads are often stretched thin; however, they prioritize finding time to give each employee their undivided attention over a nice warm coffee. It is our time to have our voices heard and allows for a more transparent company." - Danielle Huseas, tenured team member of WCDA



Growth

What projects would you like to work on or be more involved in?



Motivation

What's one thing that should change to make you happier at work?



Communication

Where has our communication faltered?
Can you give me an example?

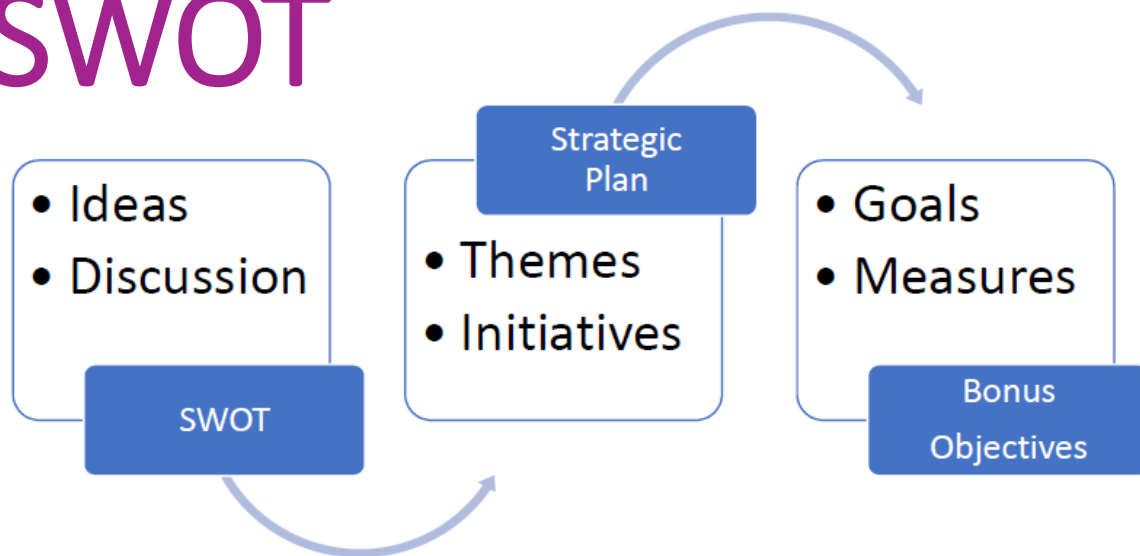


Work

What, if anything, feels harder than it should be in your day-to-day work?



Strategic Planning & SWOT



Management genuinely seeks and responds to suggestions and ideas. (Respect)



Management genuinely seeks and responds to suggestions and ideas. (Respect)



Results



7% Flight Risk Employees are disconnected and not invested in staying long term

0% Burnout Culture Employees are willing to give extra but are not experiencing a high trust culture

79% of your team members are experiencing a **high-trust** culture and are invested in your organization.

79% of your team believes management shows **appreciation** for good work and extra effort (16% increase)

77% of your team says management is approachable and easy to talk with (11% increase)

“Implementation of all these programs has been very effective in helping transition out of the pandemic. I feel productivity has increased, morale has improved, and overall company efficiency has improved.” – Tom Price, tenured team member of WCDA