

Mastering Leadership: Empowering Through Training

Idaho Housing and Finance Association
Management Innovation: Human Resources

HFA Staff Contact

Katie Shamy

katies@ihfa.org

Mastering Leadership: Empowering Through Training

OUR CHALLENGE

Idaho Housing and Finance Association (IHFA) is led by a strong management team. Each member of leadership brings their own strengths to the team and makes IHFA what it is today. Our company, like many others, faces the significant challenge of designing and implementing an effective training and development program for leadership. We have struggled with several management-related issues, including inconsistent policy implementation, lack of knowledge in employee related processes, and employee performance struggles. These challenges not only hindered employee morale and productivity but also posed obstacles to our long-term success.

One of the primary difficulties we encountered was the absence of a standardized approach to leadership training. Without a structured program in place, managers lacked the necessary skills and knowledge to lead effectively, resulting in communication breakdowns and disengaged teams. Additionally, there was a noticeable gap in understanding fundamental management principles and techniques, leading to inefficiencies in leading their teams.

OUR INNOVATIVE SOLUTION: MANAGEMENT FUNDAMENTALS 101

The implementation of Management Fundamentals 101 stemmed from the recognition of pressing challenges in leadership training and development within our organization. By addressing these obstacles head-on and providing comprehensive training in essential management skills, we aimed to empower our leaders to drive positive change, foster innovation, and continue to function as a best in class organization.

HOW WE DID IT

Our Management Fundamentals 101 course initially followed an 8-week structure, combining both in-person presentations and individual online training sessions. Following completion of the course by our existing leadership team and reviewing feedback, we streamlined the program into a condensed 2-day in-person event. For purposes of this narrative, we have shown how the topics flowed week by week during our 8 week sessions. The exhibits at the end of our entry show the detail from the 2-day course. Despite this restructuring, the content and topics covered in both versions of the training remain consistent and unchanged.

Week 1: Building Foundations

As participants gather for the inaugural session, the focus is on forging connections within the cohort. Through interactive activities and group discussions, individuals learn the importance of collaboration and teamwork in a professional setting. Additionally, they delve into the organization's mission, operating principles, and core values, gaining insight into the guiding ethos of the company. A critical distinction between managers and leaders is explored, highlighting the diverse roles and responsibilities each entails. Legal considerations in employment, such as compliance with labor laws and ethical practices, are also emphasized to ensure a solid foundation for the weeks ahead.

Week 2: Navigating Systems

In this self-paced module, participants engage in a deep dive into the company's HR systems and processes. Through a structured self-study program, individuals familiarize themselves with various forms and procedures essential to personnel management. A key assignment involves meeting one on one with an HR Business Partner to gain practical insights into navigating HR systems effectively.

Week 3: Talent Acquisition

The focus shifts to recruitment strategies and practices. Through in-person sessions, participants explore the recruitment workflow, expectations, and best practices for reviewing resumes and conducting interviews. They gain hands-on experience in assessing candidate suitability and aligning recruitment efforts with organizational objectives.

Week 4: Crafting the Team

Participants embark on a journey of self-discovery as they dive into the intricacies of job descriptions, essential skills, and interview techniques. Through self-study resources and practical assignments, individuals refine their understanding of key competencies and develop effective interviewing skills. Feedback from HR professionals enhances their ability to attract and select top talent.

Week 5: Managing Performance

The focus shifts to performance management, encompassing onboarding, coaching, and reviews. In-person sessions provide comprehensive insights into performance evaluation and feedback mechanisms. Participants explore the nuances of effective leadership and learn strategies for fostering employee growth and development.

Week 6: Empowering Growth

Participants engage in self-directed learning, exploring performance management concepts through online resources. Practical assignments involve creating training plans and setting team expectations, fostering a culture of continuous improvement and accountability.

Week 7: Final Preparations

As the course nears its conclusion, participants dedicate time to prepare for their final assignment, a 5-8 minute formal presentation to the cohort and organizational leadership. Through reflection and refinement, they fine-tune their presentations, ensuring clarity and coherence in conveying their roles, team contributions, and alignment with the organization's mission.

Week 8: Celebration of Achievement

In the culminating session, participants showcase their journey and accomplishments through engaging presentations. Each individual shares their role within the organization, their team's impact, and their collective contributions to advancing the company's mission. Through storytelling and reflection, they celebrate their growth and success, embodying the spirit of leadership and collaboration.

MANAGEMENT OPPORTUNITY AND AGENCY IMPROVEMENTS

The comprehensive management training program outlined above presents a significant opportunity for organizational improvement. By investing in the development of managerial skills and competencies, companies can cultivate a culture of effective leadership, enhance employee engagement, and drive business success. Through modules addressing relationship building, talent acquisition, and performance management, participants gain valuable insights and tools to navigate complex managerial challenges. Moreover, the emphasis on self-study and practical assignments fosters continuous learning and application of knowledge in real-world scenarios. Ultimately, by equipping managers with the necessary skills and resources, organizations can foster a productive work environment, optimize team performance, and achieve sustainable growth.

EASY TO REPLICATE

Management Fundamentals 101 is easy for all HFA's to replicate due to its structured and comprehensive framework. It provides a clear outline of topics, including relationship building, recruitment, and performance management, making it accessible and adaptable for various agencies. The foundation of the training is easy to implement in any HFA; allowing flexibility to add specific business needs, specific HFA policies and procedures, and adjust as needed for changes in policy or laws. Moreover, the program's availability in various formats, such as short courses and webinars, enhances accessibility and scalability. This combination of structure, relevance, and accessibility makes the management training program replicable and beneficial for a wide range of agencies and learners.

EXHIBIT 1

Welcome Sign for Training

Welcome to Manager Fundamentals 101

Dan McCarraher
Chris Smith
Brady Ellis
Jason Lantz
Mark Suderman
Susan Holmes
Jennifer Hagan
Gary Ross
Mike Riepe
Courtney Cuffe
Katie Kilgrow



EXHIBIT 2

Agenda

Manager Fundamentals 101 Agenda

THURSDAY, APRIL 4

- 8:30: Breakfast
- 9:00: Training Begins
 - Role of a Manager
 - HR Forms/Worktime
 - Legal Considerations
- 12:00: Lunch
- 12:30: Resume Training
 - Recruitment
- 4:00: Adjourn for the day

FRIDAY, APRIL 5

- 8:30: Breakfast
- 9:00: Training Begins
 - Recruitment
 - Performance Management
- 12:00: Lunch
- 12:30: Resume Training
 - Performance Management
 - Presentations
- 3:00: Adjourn



EXHIBIT 3

Photos from Training

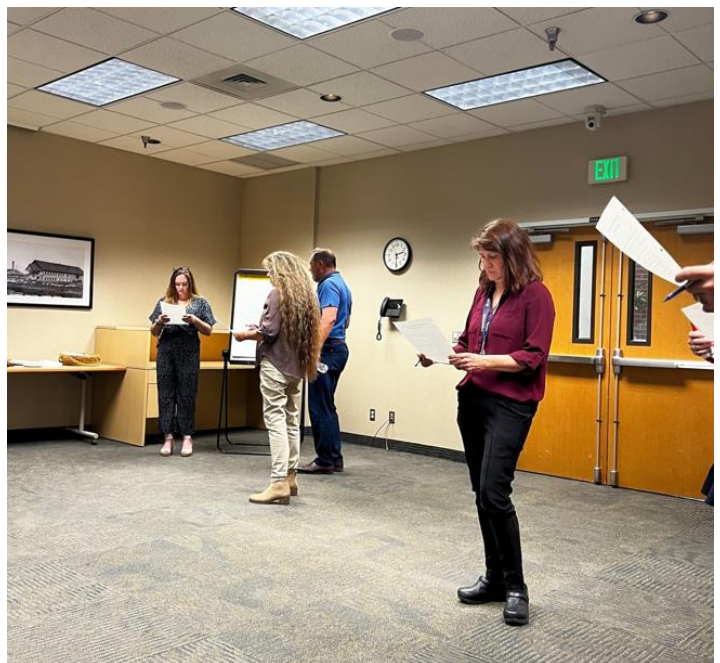
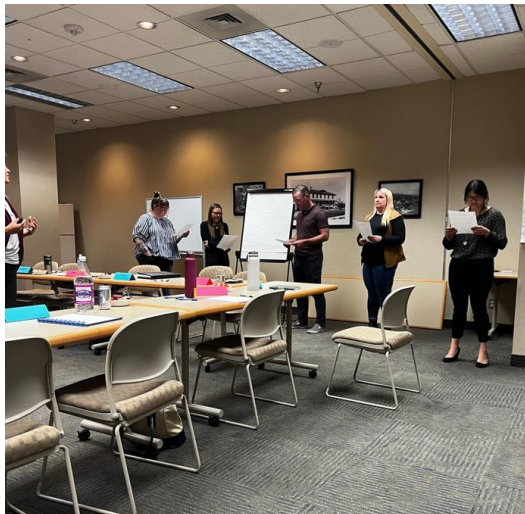


EXHIBIT 4

Management Fundamentals 101 PowerPoint Presentation



Idaho Housing and Finance Association

MANAGER FUNDAMENTALS 101

Employees are our greatest resource

GROUND RULES

- No phones or laptops
- Participate
- Ask Questions

OBJECTIVES

- Manager Responsibilities
- Legal Considerations
- Recruitment
- Performance Management
- Presentations



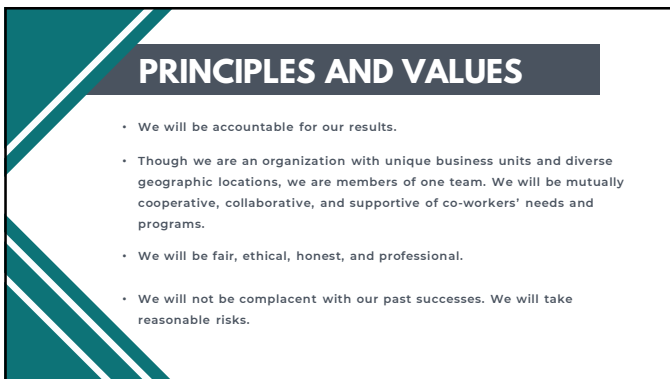
LEARNERS GUIDE



GETTING TO KNOW YOU

- What is your position/department?
- What is a hidden talent you have?
- If money and time were no object, what would you be doing right now?
- What is one sentence you'd like to hear from your boss?
- What characteristic do you value the most in your coworkers?

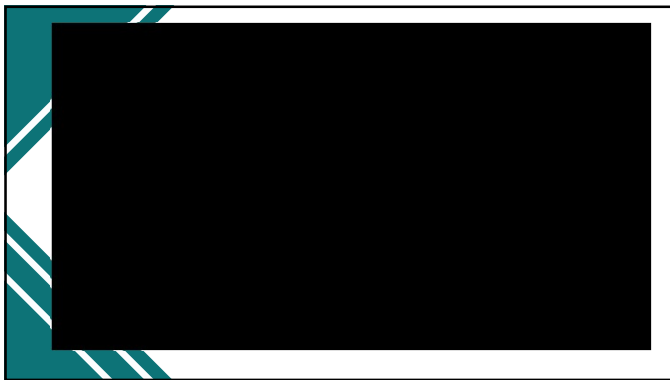
WHY IHFA?



WHAT IS A LEADER?

A LEADER IS....

Leaders motivate others to achieve something new and better



BREAK TIME!

MANAGER RESPONSIBILITIES

- MANAGER OR HR?**
- Performance / Coaching
 - Employee Development
 - Discipline
 - Terminations
 - Benefits
 - FMLA / ADA
 - Recruiting
 - Budgets / Financials

MANAGER OR HR?



HR RESOURCES

HR RESOURCES

 <p>Courtney Cuffe HR Business Partner Supporting IHFA</p>	 <p>Mariah Youngmun HR Specialist Supporting THC</p>	 <p>Shawn Hafer Director of HR</p>
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HR FORMS

HR FORMS

- FMLA
- ADA
- Workers Comp

WORKTIME

Microsoft Teams

WorkTime

2024-03-19 19:23 UTC

Recorded by
Courtney Cuffe

Organized by
Courtney Cuffe

LEGAL CONSIDERATIONS

LEGAL CONSIDERATIONS

- Employment at Will
- EEO
- FLSA
- FMLA
- ADA
- Workers Comp
- Respectful Workplace



EMPLOYMENT AT WILL

- Employer or employee can terminate at any time
- Keep documentation
- Implications for unemployment



EMPLOYMENT AT WILL

An example of termination for cause includes

- A) Medical Reasons
- B) Layoffs
- C) Unsatisfactory Performance
- D) All of the above



EMPLOYMENT AT WILL

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EQUAL EMPLOYMENT OPPORTUNITY

- Prevents discrimination in employment
- Based on Title VII of Civil Rights Act
- Protected Classes
 - Race, Color, Religion, Sex (including pregnancy, gender identity, and sexual orientation), national origin, disability, age (40 or older), or genetic information



FAIR LABOR STANDARDS ACT (FLSA)

- Establishes minimum wage, overtime pay, recordkeeping, and youth employment standards affecting employees
- Salary (Exempt) vs. Hourly (Non-exempt)
- Overtime



OVERTIME

- Only eligible for non-exempt employees
- IHFA work week: Saturday - Friday
- Worked hours over 40 per week
- Watch for vacation and sick time on time cards



OVERTIME

True or false: employers are not obligated to pay overtime when the overtime hours were not preapproved or authorized by the employer.

- A) True
- B) False



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- A) True
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FAMILY AND MEDICAL LEAVE ACT (FMLA)

FMLA requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to eligible employees for the following reasons:

- For incapacity due to pregnancy, prenatal medical care or child birth;
- To care for the employee's child after birth, or placement for adoption or foster care;
- To care for the employee's spouse, son or daughter, or parent, who has a serious health condition;
- For a serious health condition that makes the employee unable to perform the employee's job

Contact your HR Business Partner / Specialist to partner with you on FMLA

FAMILY AND MEDICAL LEAVE ACT (FMLA)

During an employee's FMLA absence, employers are required by law to:

- A) Maintain the employee's group health benefit coverage
- B) Continue paid-time-off accruals
- C) Allow the employee to work from home
- D) All of the above



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- C) Allow the employee to work from home
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AMERICANS WITH DISABILITIES ACT (ADA)

- Prohibits discrimination against individuals with disabilities
- Who is an "individual with a disability?"
 - Physical or mental impairment that substantially limits one or more major life activities
- Reasonable Accommodation
 - Must be able to perform essential job functions
 - Cannot provide an undue hardship to company
- Interactive Process will be led by HR



AMERICANS WITH DISABILITIES ACT (ADA)

- When is an employer "on notice"?
 - When request for reasonable accommodation is made
 - Reasonable belief that accommodation is needed to a known disability that is affecting job performance
 - Not expected to assume that someone has a disability or guess what accommodation is needed



AMERICANS WITH DISABILITIES ACT (ADA)

A disability under the ADA may also be covered under other laws, including:

- A) The Family and Medical Leave Act (FMLA)
- B) Workers' compensation
- C) State medical leave laws
- D) All of the above



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- A) The Family and Medical Leave Act (FMLA)
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AMERICANS WITH DISABILITIES ACT (ADA)

True or False: The Americans with Disabilities Act does not cover any mental or psychological disorders.

- A) True
- B) False



AMERICANS WITH DISABILITIES ACT (ADA)

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WORKERS COMPENSATION

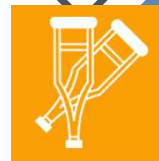
- Established to provide partial medical care and income protection to employees who are injured or become ill from their job
- Injury happens at work
- Employee to see a provider if needed
- Contact HR Business Partner/Specialist



WORKERS COMPENSATION

What is the primary goal of workers' compensation?

- A) Protect injured workers financially
- B) Shield employers from lawsuits
- C) Reward safe working behavior
- D) Fund employee training programs



WORKERS COMPENSATION

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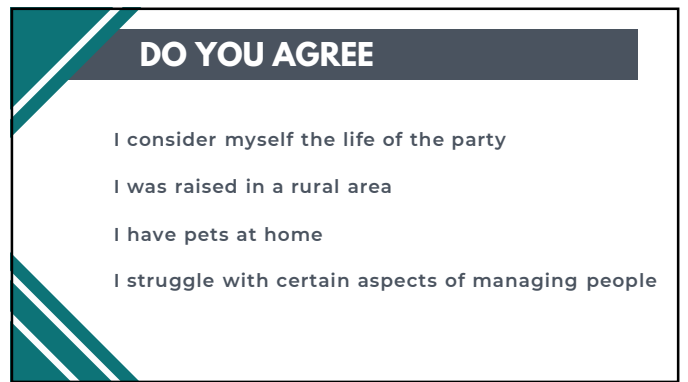
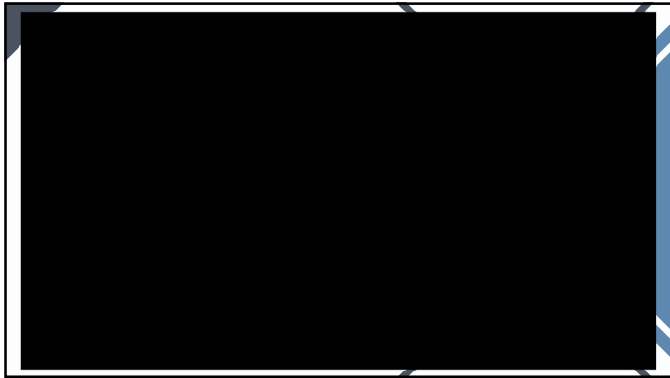
- A) Protect injured workers financially**
- B) Shield employers from lawsuits
- C) Reward safe working behavior
- D) Fund employee training programs



RESPECTFUL WORKPLACE

- Improves communication, teamwork, productivity, knowledge sharing, and job satisfaction
- Harassment
 - Protected classes under Title VII of Civil Rights Act
- Hostile Work Environment
- Workplace Violence
- Promote Diversity, Equity, and Inclusion





INTRODUCTIONS



Mariah Youngmun
HR Specialist



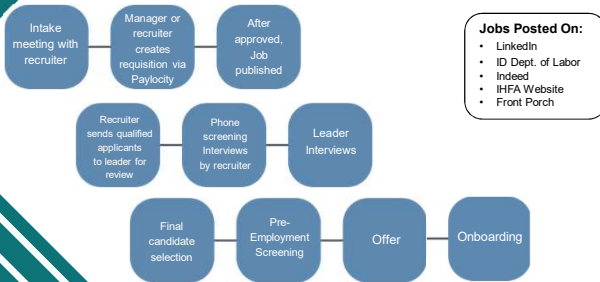
George Otero
Recruiting Coordinator

RECRUITMENT OBJECTIVES

- Recruitment Process
- Recruiting Expectations
- Resumes/Applications
- Interviews
- Interview Practice



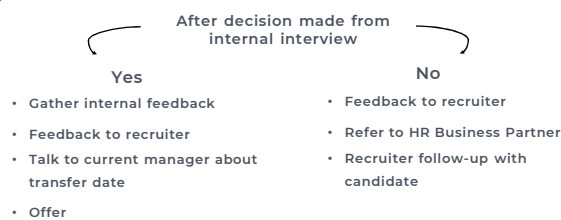
RECRUITMENT PROCESS



RECRUITMENT EXPECTATIONS

- Update current job descriptions
- Allow one week after job posting to receive resumes
- Respond within 24 hrs to resumes sent
- Interview all internal candidates
- 30-45 work days to fill a position (national average)

INTERNAL RECRUITMENT



PARTNER ACTIVITY

- Partner Up
- Review resumes provided
- What red flags can you find?



RESUME RED FLAGS

- Grammar Mistakes/Typos
- Lack of relevant job experience
- Job hopping
- Unexplained employment gaps
- Bad resume formatting
- Lack of career progression

APPLICATIONS / RESUME

What are we looking for?

- Job Tenure
- Relevant Experience
- Minimum Qualifications
- Preferred Qualifications



BREAK TIME!

INTERVIEWING

WHAT IS YOUR FUNNIEST INTERVIEW STORY?

Interview Prep

Interview Questions
Amanda Todd 06/26/2020

1. Are you able to be at the office Monday - Friday from 8-5?
2. What are your goals 5 years from now?
3. How have you dealt with conflict with a coworker and what was the result?
4. What accomplishment on previous roles are you most proud of?

AMANDA TODD

EXPERIENCE

EDUCATION

SKILLS

TRAINING / COURSES

Candidate questions to expect/prepare for

Why do you work at this company?
• Be honest
• This will show you are interested in how your career progressed
• It shows good to influence decision and company values

How do you see yourself in 5 years?
• Be as close as the biggest challenge/obstacle for improvement for this position/role
• Be honest and realistic, but also growth oriented. Show a positive view of both you and the company's direction

What are your strengths?
• Be honest and realistic, but also growth oriented. Show a positive view of both you and the company's direction

What are your weaknesses?
• Be honest and realistic, but also growth oriented. Show a positive view of both you and the company's direction

What are your hobbies?
• Be honest and realistic, but also growth oriented. Show a positive view of both you and the company's direction

What are your interests?
• Be honest and realistic, but also growth oriented. Show a positive view of both you and the company's direction

INTERVIEW STRUCTURE

- Introductions
- Information gathering
 - Review resume
 - Why did you apply
 - Questions about skill, cultural fit, experience
- Candidate Questions
- Closing/Wrap-up

TYPES OF QUESTIONS

- Direct
- Open-Ended
- Situational
- Behavioral



PROBING

- Silent (eye contact, head nod)
- Nudging
- Asking follow-up questions



IS THIS A GOOD QUESTION?

You enjoy teamwork and collaboration, correct?

What was the worst part about your last job?

If you could choose a different career, what would it be?

STAY AWAY!

- Rarely produce an answer
- Leading questions
- Not job-related



**WHAT ARE YOUR
FAVORITE QUESTIONS TO
ASK INTERVIEWEES?**

DON'T...

- Talk too much/Interrupt
- Promise the job, bonuses, promotions, etc.
- Give feedback during interview
- Give false expectations
- Forget to keep documentation



INTERVIEWING RED FLAGS

- Constant rescheduling
- Negativity
- Lack of professionalism
- Vague or inconsistent answers
- Demands

QUESTIONS TO EXPECT

What is the most challenging part of the job?

Why did the last person leave this position?

What are the day-to-day responsibilities?

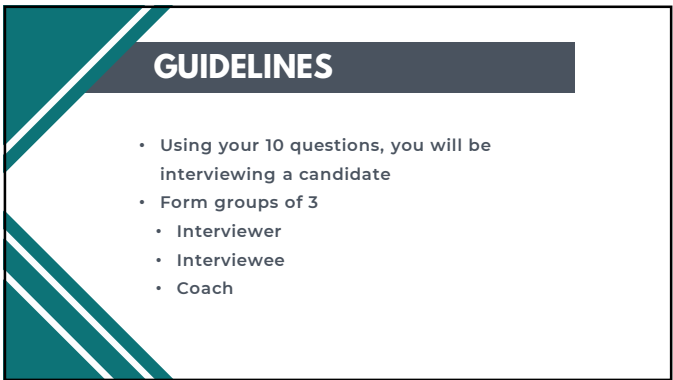
Why do you enjoy working here?

ACTIVITY

Interview Questions

- Review your job description
- Identify KSA's that are applicable to your job
- Write 10 questions relating to the KSA's using different types of interview questions
 - Direct
 - Open-ended
 - Situational
 - Behavioral

SEE YOU TOMORROW!

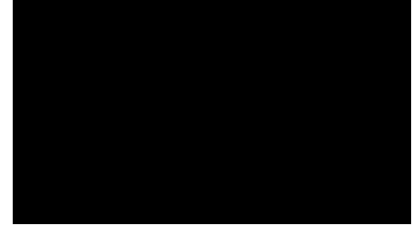


OBJECTIVES

- What is Performance Management?
- OnBoarding
- Resources
- Expectations
- Coaching
- Reviews
- Discipline



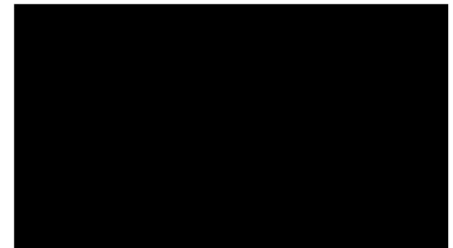
WHERE DID THIS STUFF COME FROM ANYWAY?



LET'S PLAY....
FAMILY FEUD!



What is Family Feud?



RULES

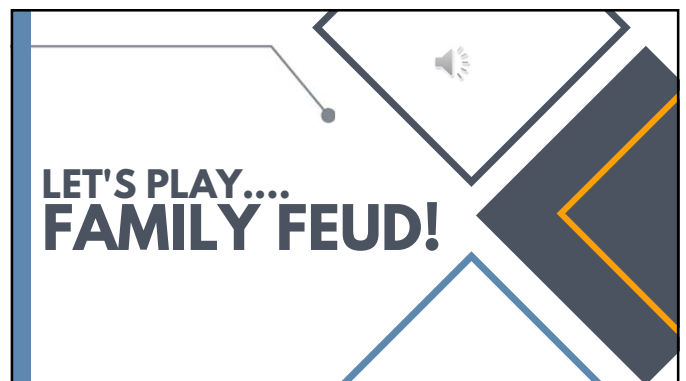
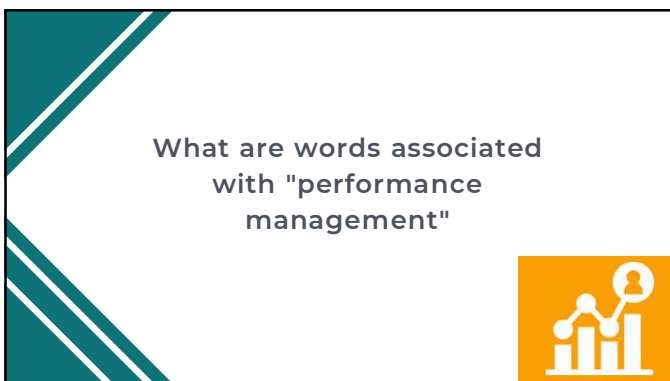
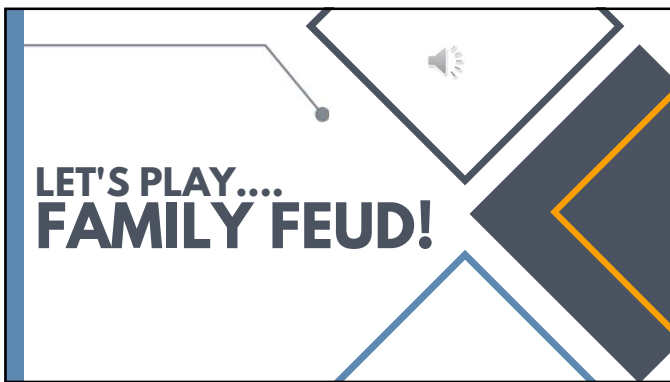
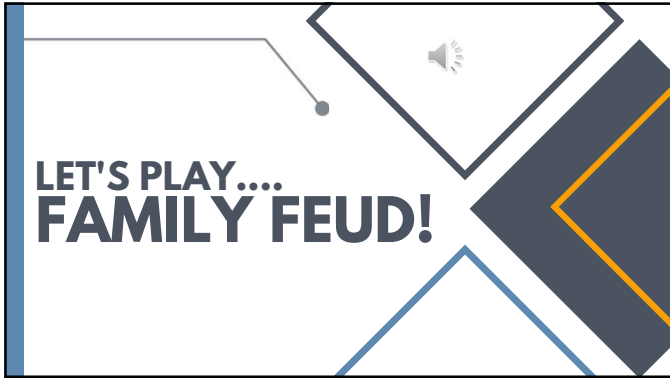
- 2 Families
- Pick a head of the family
- Pick a Family Name
- Head of the family will introduce their family
- Head of the family from each team will come to center to face off to start
- If you get the higher score for your initial answer, you may keep the question or pass to the other team
- Please stand while we are playing the game
- Each new topic will have a different family member face off in the center

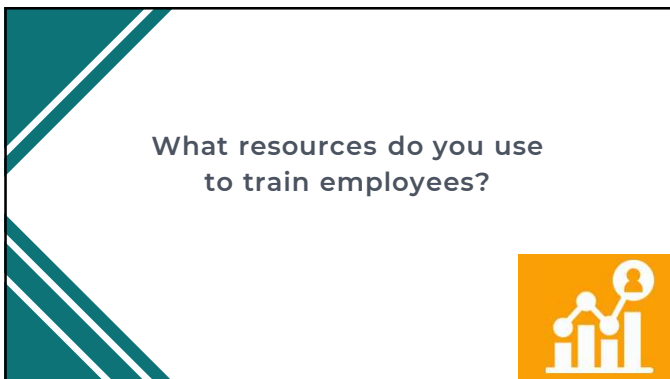
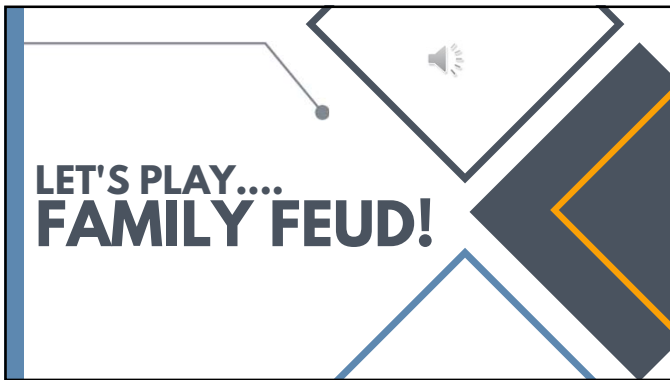
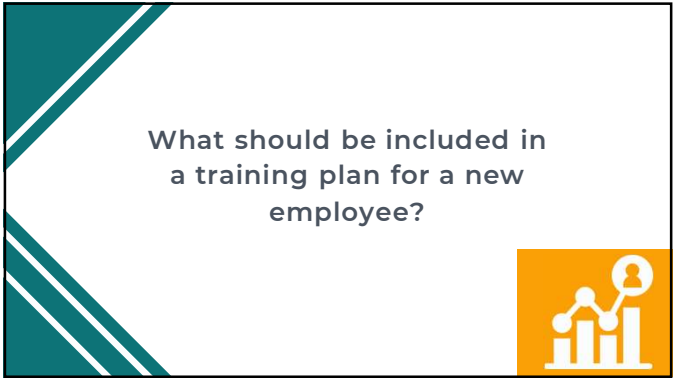
Family 1:

- Rod Zacharias
- Sarah Bray
- Erika Zappa
- Alicia Buchan
- Yasmine Gonzalez-Rubio

Family 2:

- Derek Murray
- Sneki Pavlick
- George Otero
- Tanya Hammel
- Jane Roethler





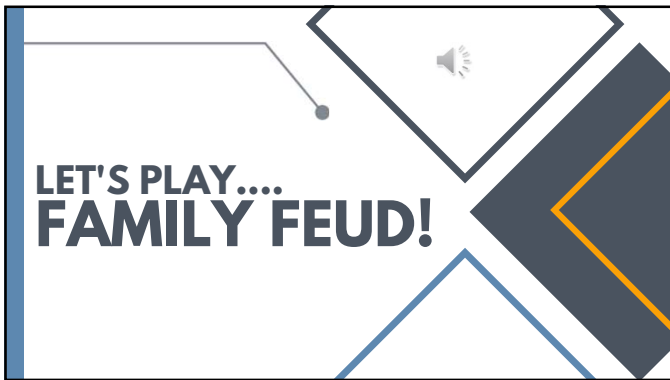

ESTABLISHING EXPECTATIONS



What expectations should a leader cover with an employee?




**LET'S PLAY....
FAMILY FEUD!**



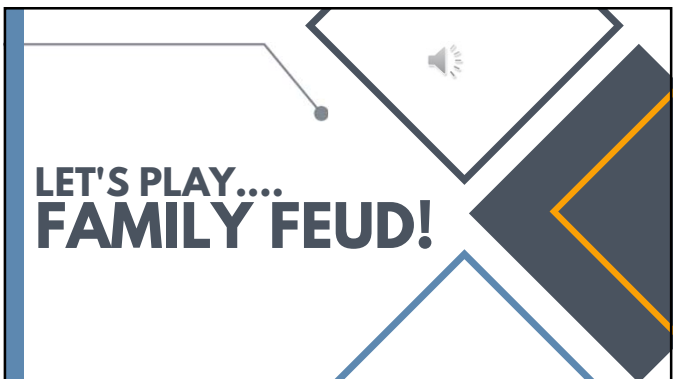

COACHING



What does a leader need to do when providing poor performance feedback?



**LET'S PLAY....
FAMILY FEUD!**




PERFORMANCE REVIEWS

What should be discussed during a performance review?




LET'S PLAY....
FAMILY FEUD!

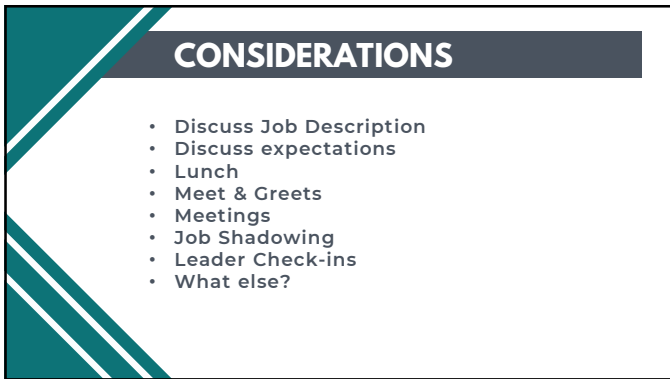
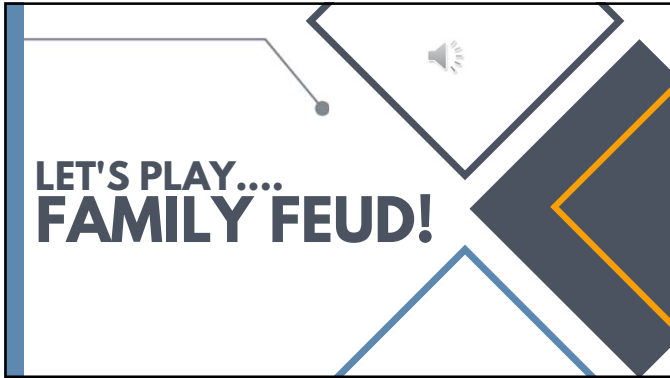


DISCIPLINE

What are some of the most common topics needing discipline in the workplace?



FINALE



EXAMPLE

Week One Schedule - Courtney Cuffe
Human Resources Generalist

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 AM		Desk Time	Desk Time	Desk Time	Desk Time
8:30 AM		Meet & Greet - Anna	Meet & Greet - Mariah	Benefits with Anna	Training Overview with Anna S.
9:00 AM		Desk Time	Meet & Greet - AJ	Desk Time	Desk Time
9:30 AM	Orientation	Meet & Greet - Lashon	HR Dept Meeting	Job Responsibilities with Shaun	Desk Time
10:00 AM		Desk Time	HR Dept Meeting	Job Responsibilities with Shaun	Desk Time
10:30 AM		Desk Time	HR Dept Meeting	Job Responsibilities with Shaun	Desk Time
11:00 AM		Job Responsibilities/Intro with Shaun	HR Generalist Meeting	Desk Time	Desk Time
11:30 AM	Set up desk	Intro with Shaun		Desk Time	Desk Time
12:00 PM	Lunch with Team	Lunch	Lunch	Lunch with Anna	Lunch
12:30 PM		Desk Time	Desk Time	Desk Time	Desk Time
1:00 PM	Job Responsibilities/Intro with Shaun	Meet & Greet - Lashon	HR Overview with AJ	Desk Time	Desk Time
1:30 PM	Intro with Shaun	Department Overview with Mariah S.	Performance/ Discipline Program with Mariah S.	Intro Plus with about with Shaun	Desk Time
2:00 PM	Desk Time	Desk Time	Park Plaza walkabout with Shaun	Desk Time	Desk Time
2:30 PM	Desk Time	Desk Time	Desk Time	Desk Time	Desk Time
3:00 PM	Check in with Shaun	Check in with Shaun	Check in with Shaun	Check in with Shaun	Check in with Shaun
4:00 PM					
4:30 PM					
Desk Time Activities	Front front - review/any ideas to change/improve? @ time (HR Academy)	Week 2	Greg Meet & Greet	On-pair with Shaun	
Review Org Chart	Week 3 & 4	Anna			
Review ADP	Meet & Greet/UX with leaders	Mariah			
Review On-Ramp		Kate P			
		Set up prior to start			
		On-Ramp			
		6:00pm			
		Outgoing?			
		Team			
		ADP			

TEAM EXPECTATIONS

ACTIVITY


- What are your expectations of your team members?
- Work on your team expectation sheet

QUESTIONS?

BREAK

SECTION 4 PRESENTATIONS

JUST BREATHE



1. Stand up straight, shoulder up, head/eyes toward the audience.
2. Keep your hands open down by your side.
3. Smile.
4. Breath in a deep diaphragmatic breath in feel your stomach expand. Count 3 seconds – 1,2,3.
5. Exhale for a full 3 seconds, count it out 1,2,3.

Presentation Agenda

- Tanya Hammel
- Rod Zacharias
- Sarah Bray
- Erika Zappa
- Alicia Buchan
- Derek Murray
- Sneki Pavlick
- Yasmine Gonzalez-Rubio
- George Otero
- Jane Roethliker



THANK YOU!!!

EXHIBIT 5

Management Fundamentals 101 Trainer Guide



MANAGER FUNDAMENTALS

101



Trainer Guide



SUPPLY LIST



Supplies

- Clicker
- Speaker
- Laptop, mouse, keyboard
- Power Cord
- Pens
- Markers
- Big Sharpies
- Highlighters
- Trainer Guide
- Learner Guides
- Nametags
- True/False Cards
- A-D small cards
- Manager / HR / Both Cards
- Job Descriptions
- Family Feud nametags
- Big Family Feud family sign
- Buzzers
- "X"s
- Flipcharts - 2
- Family Feud Answer Boards
- Prizes for family feud
- Presentation queue cards
- Snacks
- Drinks



TASK LIST



Prior to training day

- Order breakfast and lunch for both days
- Reserve conference room
- Purchase Snacks
- Calendar invitation to participants
- Change family feud slides - Family teams
- Change Presentation agenda (on slide show and learner guide) - add order of presenters
- Add presentations to slide deck
- Print Participant guides
- Name Tags
- Certificates

Day of training

- Put out snacks
- Play Music
- Flip Chart papers up around room (4) / markers
- Write OT example on white board - turn so it's not showing

After training

- Send Survey
- Record participants in Paylocity under skills/certs



INTRODUCTION



Welcome to Manager Fundamentals 101

I'm happy to have all of you here to get some basics on management here at IHFA. We will be together for the next 2 days, covering some manager fundamentals. Some of you are newer to management, others of you have been win a management position for quite a while so some of the topics may be new to you, and others will be a refresher.



GROUND RULES



GROUND RULES

- No phones or laptops
- Participate
- Ask Questions

Quick ground rules...

- No phones or laptops - I'm sure you all know why...but would really like this session to be very interactive...it's not going to work if you are distracted. I really appreciate you giving your attention to the course and the people in the room.
- Participation - this is key for today. You are in a role where you need to be comfortable to speak up. Today will be a lot more fun if we keep it interactive. Believe me, you don't want me to stand up here and lecture you about FMLA and ADA for 2 hours!
- Questions - Yes, Please! Let's chat about things. It's a safe place to ask questions - will I know all the answers - doubtful, but I can find answers for you if we aren't able to cover during our time together.

OBJECTIVES



OBJECTIVES

- Manager Responsibilities
- Legal Considerations
- Recruitment
- Performance Management
- Presentations



Here's a quick overview of what we will be covering over the next 2 days. We'll talk about manager responsibilities, legal considerations when it comes to your people, recruitment, performance management, and we'll end with learning about each other's work responsibilities through the presentations each person has prepared.

You have a participant guide to follow along, make notes, and do some activities. It's yours - write all over it to refer back to later.



ICE BREAKER



GETTING TO KNOW YOU

- What is your position/department?
- What is a hidden talent you have?
- If money and time were no object, what would you be doing right now?
- What is one sentence you'd like to hear from your boss?
- What characteristic do you value the most in your coworkers?



We are going to break up into groups of 3-4 and spend the next 10 minutes getting to know each other a little better. Here are some questions to get you started. Make sure everyone has time to share. You will be going through the course as a group, this is a good way to start building relationships with the people in this room - you will have resources to lean to later on.

- Break into groups of 3-4
- Bring up questions on slide
- 10 minutes for discussion
- Go through groups, one interesting thing about each person





WHY IHFA?



Before we jump into our training, it's important to remember why we are here. Why are you here?

Ask people for comments.

When I speak with employees about why they work at IHFA, the main feedback is overwhelmingly 2 things: the people who work here and the mission of the company. As a leader, we want you to be advocates of the mission.

IHFA MISSION



Can anyone tell me the mission off the top of your head?

Give time for someone to answer





IHFA MISSION



IHFA MISSION

Idaho Housing and Finance Association improves lives and strengthens Idaho communities by expanding housing opportunities, building self-sufficiency, and fostering economic development.

Have someone read the slide.

What does this mean to you?

As people work in their day to day tasks, sometimes we forget the reason that we are here.

How can you incorporate this into your teams? (Ideas - use in team meetings, signs, talk about how your team lives the mission/work you do helps support the mission)

OPERATING PRINCIPLES AND VALUES



- Divide participants into 4 groups
- Pass out printed values
- Assign 2 values per group
- In your group, discuss what the values mean to you, your team, and the organization
- Make some kind of visual representation of the values assigned
- 20 minutes for group activity



PRINCIPLES & VALUES



PRINCIPLES AND VALUES

- Employees are our greatest resource. We value the contributions of every person and encourage open communications.
- We will be driven by a sense of personal responsibility to do our work to the best of our ability. Meeting our responsibilities will be a way of life, not a means to gain reward.
- We will serve our customers with dedication, courtesy, concern, respect, and responsiveness.
- We will pioneer innovative, creative, cutting-edge ways to do our work, focusing on results, not processes.

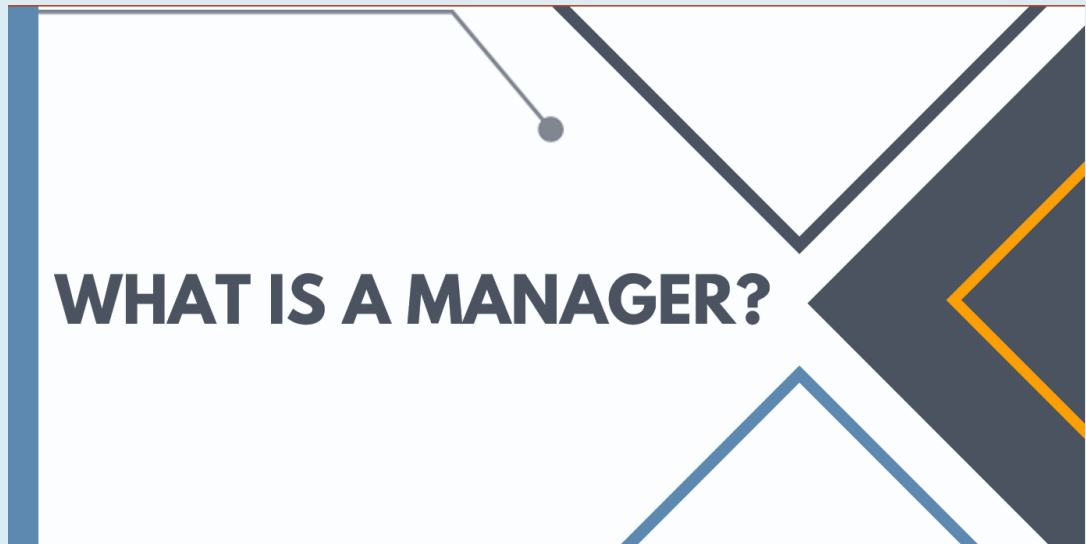
PRINCIPLES AND VALUES

- We will be accountable for our results.
- Though we are an organization with unique business units and diverse geographic locations, we are members of one team. We will be mutually cooperative, collaborative, and supportive of co-workers' needs and programs.
- We will be fair, ethical, honest, and professional.
- We will not be complacent with our past successes. We will take reasonable risks.

- Go through each value on slides
- Have a member of the group read the value
- Another member of the group presents what they drew



WHAT IS A MANAGER?



Write “Manager” on white board

On page 5 of your learners guide, write what makes a manager - be descriptive.

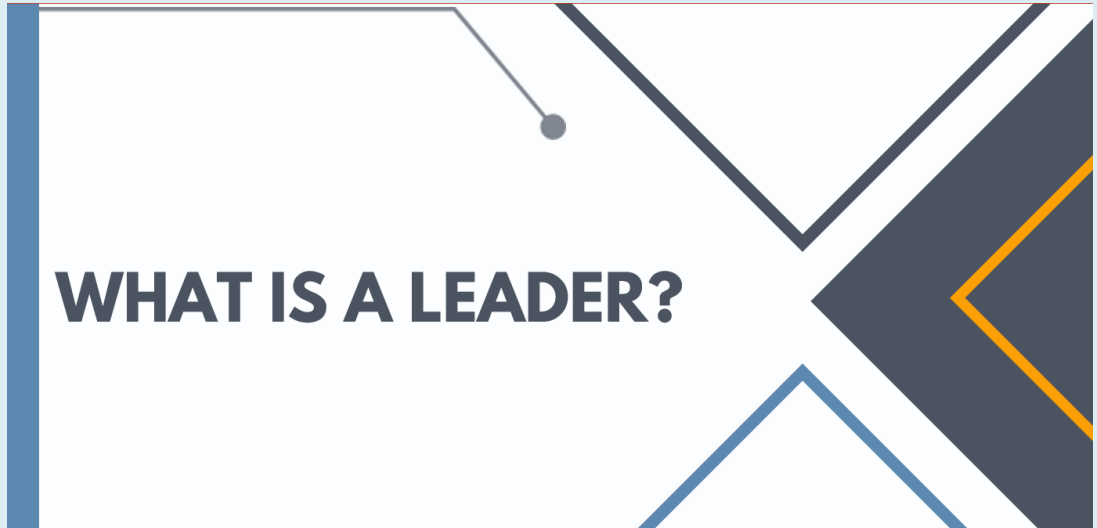
Ask for group to share some of their answers after giving a couple of minutes to think about it.

Ask “what is a manager” and add answers to white board

Examples: make sure everything gets done, assign tasks, hold people accountable, run the department/team



WHAT IS A LEADER?



Write "Leader" on white board

What makes a leader different than a manager?

Discussion on difference between manager (task oriented) vs Leader (inspirational, motivating, building others)



WHAT IS A LEADER?



A LEADER IS....

Leaders motivate others to achieve something new and better



According to my quick google search, the definition of a leader is this: Leaders motivate others to achieve something new and better.



Play Ted Talk (Sinek)



BREAK



10 - 15 minute break, depending on time



MANAGER RESPONSIBILITIES



For most of the Manager Fundamentals course, we will be focusing on Management responsibilities (day to day need to know to manage your team). We are actively creating courses that will be available for you to develop more as a Leader.



MANAGER OR HR



MANAGER OR HR?

- Performance / Coaching
- Employee Development
- Discipline
- Terminations
- Benefits
- FMLA / ADA
- Recruiting
- Budgets / Financials

Hand out HR/Manager/Both Cards

Sometimes there is confusion on whether a supervisor/manager or HR should address situations. Let's go through a few.

You can refer to page 6 of your learners guide for this activity.

All answers are "Both" - have discussion with group on the topics. Ask participants why they answered the way they did.

HR is here to be your partner. Please reach out to your HR Generalist for guidance and advice on how to handle these difficult situations. Many times, there are legal ramifications on these type of decisions and we can help talk through that. Ultimately, many of the people decisions that you will be making are your decisions (and your leader - up to executives). We are here to work with you.



MANAGER OR HR



Remember - Everything is awesome when you work as a team



HR RESOURCES



As a leader in the organization, HR is here to partner with you and help you with anything people related.



HR RESOURCES



HR RESOURCES

Courtney Cuffe
HR Business Partner
Supporting IHFA

Mariah Youngmun
HR Specialist
Supporting THC

Shawn Hafer
Director of HR

I'd like to introduce you to a few of your main contacts from HR.

Courtney Cuffe is our HR Business Partner. She supports IHFA employees and departments.

Mariah Youngmun is our HR Specialist who is supporting our THC employees.

They are here to be your first stop for any HR questions.

Shawn Hafer is the Director of HR, he is always available for any questions, issues, or ideas you have to help make your team better as well.



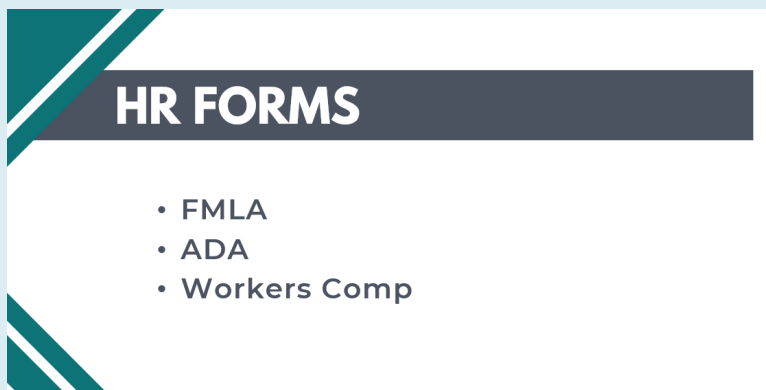
HR FORMS



In HR, we love forms and procedures!



HR FORMS



I am going to give you a high-level view the processes for common HR topics. We'll talk more on these items a little later.

FMLA: A leader or employee will notify myself or Mariah of a need to be gone for FMLA. HR will provide the FMLA form that needs to be completed by the employee and the employee's medical provider to complete and return to HR. If the employee returns within 15 days, the request is reviewed and the approval or denial will be communicated to the employee. HR will let the leader know of the leave approved. We do not provide many details other than dates for HIPPA compliance.

ADA: Similar to FMLA, the employee will contact HR with a request for an accommodation. HR will provide the employee with a form for the medical provider to complete. When the form is returned HR will start an interactive process and work with the employee and the leader.

Workers Comp: When an employee is injured, contact HR and we will complete the necessary paperwork with your input.



WORKTIME



Worktime is a tool for helping leaders track if employees are actively working on their computer. If you have not seen this program, let me know and we can make sure you have it on your computer and get you access.

This is a great tool to look for patterns, look at attendance, and see if you have an employee who may be spending too much time on personal things while at work.

It's helpful, but remember that it's not the only thing you should use for looking at attendance and performance. You know your employees the best and know how much they should be on their computer.



WORKTIME



Microsoft Teams

WorkTime

2024-03-19 19:23 UTC

Recorded by
Courtney Cuffe

Organized by
Courtney Cuffe

[Play video](#)

Are there any questions?



LEGAL



**LEGAL
CONSIDERATIONS**

We are moving into legal topics concerning your employees.

If you have any of the next topics come up, please reach out to HR (Courtney or Mariah) to work through. There are legal ramifications to you and the company if we do not address properly.

Pass out ABCD and True/False cards



LEGAL



LEGAL CONSIDERATIONS

- Employment At Will
- EEO
- FLSA
- FMLA
- ADA
- Workers Comp
- Respectful Workplace



Each of these topics could be a full day course, so we are going to go over just the basics.

We'll cover

- Employment at will
- Equal Employment Opportunity
- Fair Labor Standards Act
- Family & Medical Leave Act
- Americans with Disability Act
- Workers Comp
- Respectful Workplace



AT WILL



EMPLOYMENT AT WILL

- Employer or employee can terminate at any time
- Keep documentation
- Implications for unemployment



At Will Employment

Idaho is what we call a “right to work” state. As such, people can leave at any time and we can ask people to leave at any time.

For any of you who have terminated an employee, you know it’s not that easy, which is why we ask you to keep good documentation on performance.

If we do terminate an employee, it is possible that they may be eligible for unemployment.



AT WILL



EMPLOYMENT AT WILL

An example of termination for cause includes

- A) Medical Reasons
- B) Layoffs
- C) Unsatisfactory Performance**
- D) All of the above



Read question on slide and have participants hold up letter card they think is appropriate.

Answer: C - Unsatisfactory Performance

Discuss as needed



EEO



EQUAL EMPLOYMENT OPPORTUNITY

- Prevents discrimination in employment
- Based on Title VII of Civil Rights Act
- Protected Classes
 - Race, Color, Religion, Sex (including pregnancy, gender identity, and sexual orientation), national origin, disability, age (40 or older), or genetic information



Equal Employment Opportunity, or EEO, was enacted to prevent discrimination in employment.

This applies in hiring, transfers, promotions, etc.

There are certain protected classes - does anyone know what they are?

Show answers of protected classes

Discuss as needed



FLSA



FAIR LABOR STANDARDS ACT (FLSA)

- Establishes minimum wage, overtime pay, recordkeeping, and youth employment standards affecting employees
- Salary (Exempt) vs. Hourly (Non-exempt)
- Overtime



FLSA – think about anything affecting how we pay people.

Let’s start with talking about the difference between exempt and non-exempt positions. Each job in the organization has been analyzed to determine what category the job falls into. There is a “job duties test” that is performed as part of that analysis. The 3 typical categories of exempt job duties are executive, professional, and administrative.

A first qualification for exempt classification is pay. Currently, to be exempt, you must be compensated at least \$35,568 per year. This has gained a lot of attention over the past years that the amount should be increased. We’ll see where that goes.



If the position does not meet the job duties test or pay threshold, the position is non-exempt, or an hourly position. We do not make a job exempt just because we don’t want to pay OT and the position requires additional time to complete.

FLSA



In Paylocity, an exempt employee need to take time off in 4 hour increments. If they need to miss 1-2 hours for the day, they would not record any time off. You do not have them add the missed time for multiple days and when it hits 4 or 8 record that.

An exempt employee is paid to perform/complete a job, not to be paid hourly. Hourly (non-exempt) employees get paid for the number of hours they work.

Go to next slide to talk more about OT.



OVERTIME



OVERTIME

- Only eligible for non-exempt employees
- IHFA work week: Saturday - Friday
- Worked hours over 40 per week
- Watch for vacation and sick time on time cards



If employees work more than 40 hours, we need to pay them overtime. Overtime is WORKED hours over 40 in a specified week. At IHFA, our work week is Saturday- Friday. If there is a holiday in the week, there may be additional hours worked/paid at regular rate.

Give example on white board.



OVERTIME



At one time, we didn't have employees work OT at all. Due to business needs, that has changed in some areas. OT does need to be approved ahead of time, there are times employees are looking for a little extra money so will want to work OT.

As a leader, you need to look carefully at these situations as you are making decisions that affect the company. We only budget a certain amount of money each year for OT. If it's needed, great. If there is not work that needs to be completed at that time, you need to have that conversation with your employee and make the best decision. However, if someone works OT and has not requested it prior, we do still need to pay it.

This can lead into a coaching/performance discussion. We want to remember our culture- many people work here because of the work/life balance and we want to uphold that.

If you have OT questions, reach out to payroll (Ali) and your HR Representative.



OVERTIME



OVERTIME

True or false: employers are not obligated to pay overtime when the overtime hours were not preapproved or authorized by the employer.

- A) True
- B) False



Read question on slide and have participants hold up card they think is appropriate.

Answer: False

Discuss as needed



FMLA



FAMILY AND MEDICAL LEAVE ACT (FMLA)

FMLA requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to eligible employees for the following reasons:

- For incapacity due to pregnancy, prenatal medical care or child birth;
- To care for the employee's child after birth, or placement for adoption or foster care;
- To care for the employee's spouse, son or daughter, or parent, who has a serious health condition;
- For a serious health condition that makes the employee unable to perform the employee's job

Contact your HR Business Partner / Specialist to partner with you on FMLA

Qualifications:

- Worked for IHFA for at least 12 months
- Have worked at least 1250 hours during the previous 12 months

Read the eligible reasons from the slide.



FMLA



For FMLA - can get up to 12 weeks of leave
Military caregiver - up to 26 weeks of leave

At IHFA, we use a rolling 12 months to determine the "year". FMLA is job protection, not necessarily paid unless the employee uses their leave banks or use Short term disability benefits.

We require doctor certifications for everything.

If you have an employee who will be gone for more than 3 days for a medical condition, they should complete the FMLA documentation. You should have a flag go up in your mind if you have someone who has called in sick multiple days as that person may qualify for FMLA and we are required to offer them protection. It is the employees' responsibility to follow through and complete the paperwork, but we do need to offer it. We'll walk through that process later on.

This can get complicated and we ask for all medical certification to come directly to HR for privacy of the employee (HIPPA). Please reach out to your HR Rep to help you through the process.



FMLA



FAMILY AND MEDICAL LEAVE ACT (FMLA)

During an employee's FMLA absence, employers are required by law to:

- A) Maintain the employee's group health benefit coverage**
- B) Continue paid-time-off accruals
- C) Allow the employee to work from home
- D) All of the above



Read question on slide and have participants hold up letter card they think is appropriate.

Answer: A - Maintain the employee's group health benefit coverage

If someone does not have any pay coming to them, we will have the employee take extra deductions ahead of time or write a check to the company while they are out to maintain their coverage.

Remote work is not something we legally have to offer.

Discuss as needed



ADA



AMERICANS WITH DISABILITIES ACT (ADA)

- Prohibits discrimination against individuals with disabilities
- Who is an "individual with a disability?"
 - physical or mental impairment that substantially limits one or more major life activities
- Reasonable Accommodation
 - Must be able to perform essential job functions
 - Cannot provide an undue hardship to company
- Interactive Process will be led by HR



The basic idea of ADA is that if we (as a company) can provide an accommodation to someone that can help someone with any type of disability to be able to be able to do their job, we should try to figure that out. It's doing the right thing.

HR will lead the interactive process with the employee (again, to protect their personal information). The employee may be required to submit doctor certification that there is a disability.



ADA



HR will ask what accommodation the employee needs and will then work with you (leader) to determine if it is “reasonable” or if it would cause an “undue hardship” to the company. You will hear “reasonable accommodation” and “undue hardship” a lot when we talk about an ADA case.

Ask for examples

Give an example of what could be an undue hardship (i.e. having to miss work for a year) vs. what would not be (i.e. providing ergonomic keyboard).



ADA



AMERICANS WITH DISABILITIES ACT (ADA)

- When is an employer "on notice"?
 - When request for reasonable accommodation is made
 - Reasonable belief that accommodation is needed to a known disability that is affecting job performance
 - Not expected to assume that someone has a disability or guess what accommodation is needed



Does anyone know what it means to be "on notice" for ADA?

Read information on slide. Ask participants what that means to them.

Discuss as necessary.



ADA



AMERICANS WITH DISABILITIES ACT (ADA)

A disability under the ADA may also be covered under other laws, including:

- A) The Family and Medical Leave Act (FMLA)
- B) Workers' compensation
- C) State medical leave laws
- D) All of the above**



Read question on slide and have participants hold up letter card they think is appropriate.

Answer: D: All of the Above

Discuss as needed



ADA



AMERICANS WITH DISABILITIES ACT (ADA)

True or False: The Americans with Disabilities Act does not cover any mental or psychological disorders.

A) True

B) False



Read question on slide and have participants hold up true/false card they think is appropriate.

Answer: False

Discuss as needed. Mention that this has become a big topic in the last few years and more cases are coming forward on accommodations for mental health.



WORKERS COMP



WORKERS COMPENSATION

- Established to provide partial medical care and income protection to employees who are injured or become ill from their job
- Injury happens at work
- Employee to see a provider if needed
- Contact HR Business Partner/Specialist



Any injury that happens at work needs to be submitted. If approved, WC pays about 2/3 of an employee's salary for the time they miss from work and covers medical expenses.

Ask for examples.

(Slipping on ice, tripping, cut yourself, inspector bit by a dog, etc)

As we talked about earlier, there is paperwork that needs to be completed that we submit to our WC provider. If the employee needs immediate attention, please worry about that first and we'll do the paperwork later.



WORKERS COMP



WORKERS COMPENSATION

What is the primary goal of workers' compensation?

- A) Protect injured workers financially**
- B) Shield employers from lawsuits
- C) Reward safe working behavior
- D) Fund employee training programs



Read question on slide and have participants hold up letter card they think is appropriate.

Answer: A: Protect injured workers financially

Discuss as needed



RESPECTFUL WORKPLACE



RESPECTFUL WORKPLACE

- Improves communication, teamwork, productivity, knowledge sharing, and job satisfaction
- Harassment
 - Protected classes under Title VII of Civil Rights Act
- Hostile Work Environment
- Workplace Violence
- Promote Diversity, Equity, and Inclusion



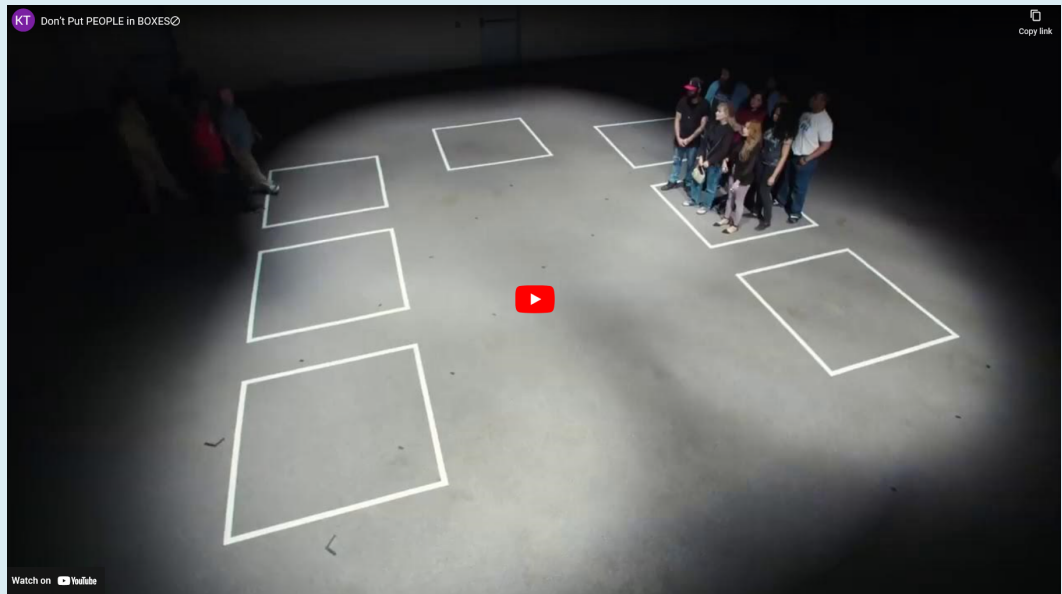
Respectful Workplace – this is a journey. We revised this policy a couple of years ago to be more inclusive. We really just focused on harassment & workplace violence but have expanded to the idea of respect which covers those 2 topics, but opens a bigger conversation. It’s more than EEO and anti-harassment.

Why is this important?

Discuss as needed



RESPECTFUL WORKPLACE



Play Video



LUNCH



LUNCH TIME!



STEP UP ACTIVITY



DO YOU AGREE

I consider myself the life of the party

I was raised in a rural area

I have pets at home

I struggle with certain aspects of managing people

DO YOU AGREE

I have been with IHFA for over 5 years

I am a parent

I graduated from college

I've hurt someone's feelings at work

I am excited about IHFA's mission and working to fulfill it

Intro activity - reference video before lunch. We are going to do the same thing.

Have everyone line up and step forward if the statement applies to them.

Ad lib and ask questions of people.



RECRUITMENT



Our next section talks about recruitment.



INTROS



INTRODUCTIONS

Mariah Youngmun
HR Specialist

George Otero
Recruiting Coordinator

Here are our recruiters! Mariah Youngmun does the recruiting for The Housing Company and George Otero is our recruiter for IHFA.



OBJECTIVES



RECRUITMENT OBJECTIVES

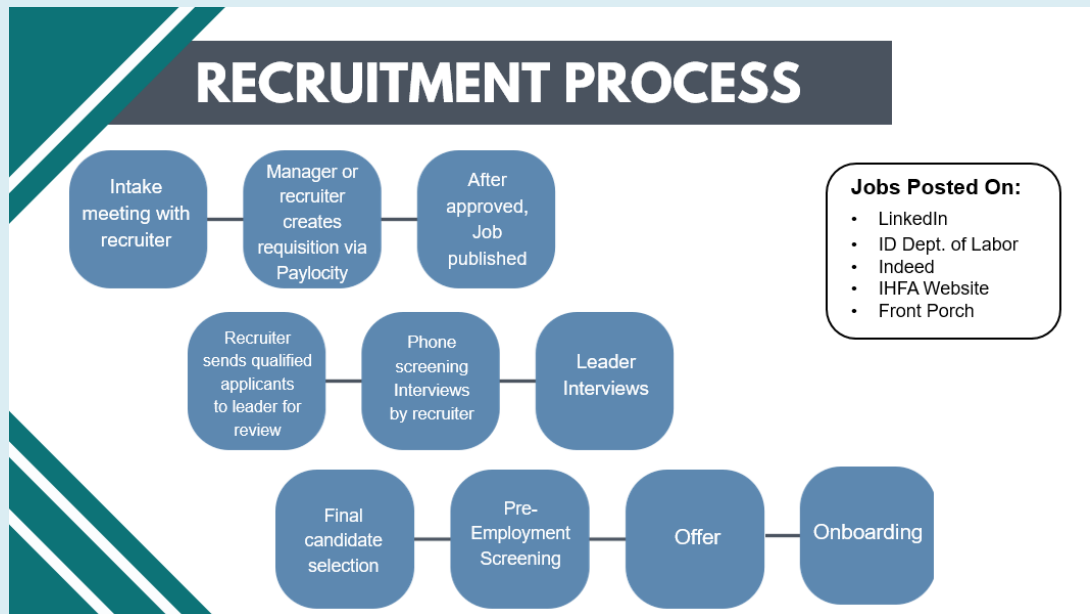
- Recruitment Process
- Recruiting Expectations
- Resumes/Applications
- Interviews
- Interview Practice



For our recruitment section, we will be covering the process, expectations, resumes and applications, and interviewing.



PROCESS



To begin our recruitment process, the recruiter will meet with the hiring manager to discuss the position and what they are looking for in a candidate. If you need specific skillsets, this is where you would talk about that. If something is just nice to have, make sure you communicate that as well.

The manager will then create a requisition in Paylocity, which will go to the recruiter to get posted. We currently post on the IHFA or THC website, DOL, Indeed, and internally. Depending on the job, we also post on Indeed. If you have any specific sites you would like to post, let your recruiter know that during your intake meeting. For example, when we have an opening in HR, we post the position with HRATV, our local organization for HR professionals. We also have posted on NAHRO, AHMA, NCSHA, etc depending on the position.



PROCESS



The process can vary depending on what the hiring manager would like. Typically our process after posting follows the following path:

Recruiter reviews applications and sends qualified applicants to the leader to review. If the leader decides to proceed with recruitment for the applicant, Recruiter will do a phone screen to make sure the candidate meets the qualifications.

If the candidate passes the phone screen, an interview is set up with the leader. You can have multiple people interview, this is also discussed during the intake meeting.

After the leader has selected a final candidate, HR will conduct the necessary screenings. If everything checks out ok, the Recruiter will contact the leader to let them know we are ready to offer the position. The leader will extend the offer to the candidate. When the position is accepted, we move the candidate into the onboarding process.



EXPECTATIONS



RECRUITMENT EXPECTATIONS

- Update current job descriptions
- Allow one week after job posting to receive resumes
- Respond within 24 hrs to resumes sent
- Interview all internal candidates
- 30-45 work days to fill a position (national average)

We do have some expectations of hiring managers to ensure a successful recruitment process.

1. It is important to have a current job description - if you have any changes for the job description, please work with your HR Business Partner or Specialist to update that. This is our baseline of what to look for in a candidate.
2. It takes time for applications to come in. Typically, it takes about a week to start getting a good pull of candidates. Many people apply on the weekend or evenings when they are not working.
3. Candidates go quickly, so when we do get good potential people, we ask that you respond within 24 hours if you would like to proceed with that candidate.



EXPECTATIONS

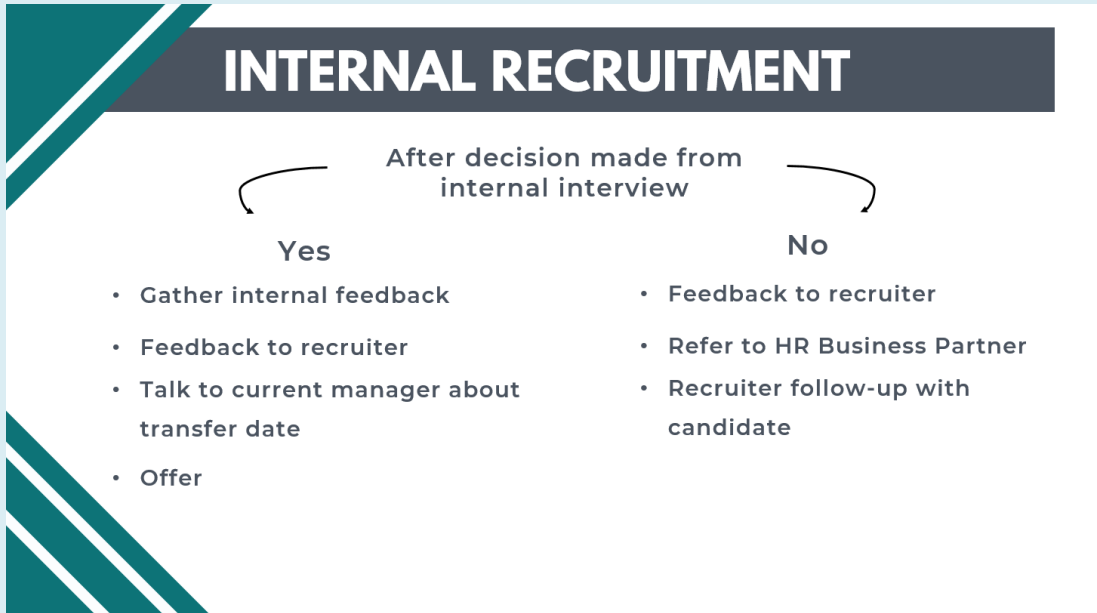


4. We love internal promotions, it's good for our employees for their personal development. Even if you don't think the person is qualified, there may be something in their background that is relevant for your position. This is also a good time to work with training/development to help that person build skills to be qualified the next time you have an opening.

5. The national average to fill a position is 42 days. This is highly dependent on the position. Higher level/technical positions usually take longer than an entry-level position.



INTERNAL



Internal recruitment has a few nuances.

If you decide to move forward with an internal candidate, you can discuss with the person’s current supervisor to see if there is anything you need to be aware of. For example, how is the person’s attendance?

If you are comfortable moving forward, discuss what transfer date will work for both of you as leaders. Remember if the person was going to leave the company, you would have 2 weeks for the transition. This would be typical in a transfer as well.

After the logistics are worked out, work with recruiter for the offer amount and offer to the candidate.



INTERNAL



If you decide NOT to move forward with an internal candidate, discuss with the recruiter your reasons. The recruiter will work with HR Business Partner/Specialist to see if there is anything we can offer the employee for future development. The recruiter will follow up with the employee.



RESUME ACTIVITY



PARTNER ACTIVITY

- Partner Up
- Review resumes provided
- What red flags can you find?



On page 19 - 22 of your learner's guide you will find some resumes of potential candidates. Pick a partner and team up to find red flags on the resumes. What would make you pause to interview this candidate if you saw the resume? What questions would you have for follow up?

Give 10 minutes for review.

Ask the group for examples of what they found (may want to write responses on white board)



RED FLAGS



RESUME RED FLAGS

- Grammar Mistakes/Typos
- Lack of relevant job experience
- Job hopping
- Unexplained employment gaps
- Bad resume formatting
- Lack of career progression

Here are some common red flags on resumes. They don't always mean you shouldn't interview the candidate - it depends on the position.

Grammar mistakes - if there are a lot of typos, this candidate isn't trying very hard, which will most likely translate into their performance on the job.

Lack of relevant job experience - this depends on the job, if it's entry-level, that may not matter. But if you are hiring a programmer for IT and they haven't worked with computers before, that is a problem.

Job Hopping - Do you see a pattern of short tenure? What would make it any different here?

Employment gaps - this usually will be covered by the recruiter, there can be very good reasons for gaps, but something that we should ask questions on.



RED FLAGS



RESUME RED FLAGS

- Grammar Mistakes/Typos
- Lack of relevant job experience
- Job hopping
- Unexplained employment gaps
- Bad resume formatting
- Lack of career progression

Employment gaps - this usually will be covered by the recruiter, there can be very good reasons for gaps, but something that we should ask questions about.

Resume formatting - not the end of the world for some jobs, but shows a lack of professionalism.

Lack of career progression - is the person stuck? Sometimes this is ok, it depends on what you are looking for. You also need to pay attention to resumes seemingly going backwards - what happened here? Was the person an executive and then moved to an administrative position? Why? There may be a good reason. This is good to highlight and question in the interview.



WHAT TO LOOK FOR

APPLICATIONS / RESUME

What are we looking for?

- Job Tenure
- Relevant Experience
- Minimum Qualifications
- Preferred Qualifications



Here are some of the things we are looking for on a resume.

Job Tenure - Tenure expectation will differ depending on the position you are recruiting for. For a CSR, you wouldn't expect as long of tenure on jobs as you would for a manager. If you see less than a year for multiple years, that would be a red flag, but you can ask questions, there may be good justification.

Relevant Experience - does the experience they have relate to what they will be doing here? It doesn't have to be exactly the same as what we do.

Minimum qualifications - should match the job description

Preferred qualifications - what would you like to see?



BREAK



INTERVIEWS



Now that we've had a chance to review the resumes, let's talk about interviews.



INTERVIEWS



Ask the group to share a funny interview story.

Share a personal story.



PREP



Interview Prep

Interview Questions Amanda Todd 05/30/2023		Candidate questions to expect/prepare for
<p>1. Are you able to be at the office Monday- Friday from 9-5?</p> <p>2. What are your goals 5 years from now?</p> <p>3. How have you dealt with conflict with a coworker and what was the result?</p> <p>4. What accomplishment sin previous roles are you most proud of?</p>		<p>Why do you work at Idaho Housing?</p> <ul style="list-style-type: none"> Be honest Think about this ahead of time to have your answer prepared It's always good to reference mission and company values <p>What do you see as the biggest challenge(s) for improvement for this position/team?</p> <ul style="list-style-type: none"> Be honest and transparent, but give specific examples. End on a positive note, as that's what the interviewer remembers <p>Why did the last person leave this position?</p> <ul style="list-style-type: none"> Avoid negative or personal situations Fair answer: "They decided to move on to other opportunities." <p>What major skills and abilities will I need for this job?</p> <ul style="list-style-type: none"> Reference skills from job description, focus on hard skills <p>How will my performance be measured?</p> <ul style="list-style-type: none"> Explain formal performance review process Explain performance is an ongoing process <p>What are the day-to-day responsibilities? What is the organization's plan for the near term?</p> <ul style="list-style-type: none"> Give a high level explanation of job functions Don't make it sound like something it's not, be very clear and transparent

Prior to an interview, you should prep for the candidate.

1. Review the job description - if any changes, work with your HR Business Partner/Specialist.
2. Determine what interview questions you are going to ask. You should ask the same questions to all candidates you interview.
3. Review the resume - what questions do you have regarding the resume?
4. Be prepared for candidates to ask you questions - there are some examples in your guide and responses that you can tweak to make your own. Many candidates will ask why the position is open, what a typical day looks like, why you work at IHFA, etc.



STRUCTURE



INTERVIEW STRUCTURE

- Introductions
- Information gathering
 - Review resume
 - Why did you apply
 - Questions about skill, cultural fit, experience
- Candidate Questions
- Closing/Wrap-up

There is a structure we recommend when you conduct an interview.

1. Introduce yourself and any others in the room - make the candidate feel comfortable.
2. Ask questions to gather information about the candidate - explain job history, ask any follow up questions you have regarding the resume, go into behavioral questions (we'll talk about that later)
3. Leave time for candidate to ask you questions.
4. Wrap up - thank the candidate for their time and ask any final questions. End with what the next steps are for the candidate/when they should be hearing from IHFA.



QUESTION TYPES



TYPES OF QUESTIONS

Direct

Open-Ended

Situational

Behavioral



Now you know the structure on the interview, let's talk more about the type of questions you can ask.

Direct: This usually requires a yes/no answer. (Do you know how to use excel?)

Open-Ended: There is not a "correct" answer. Usually starts with how or what. (How long have you used excel? or What formulas are you familiar with in excel?)

Situational: You give a situation for the candidate to tell you what they would do. (How would you set up a spreadsheet in excel to track expenses for the month?)

Behavioral: Similar to situational, but asks for a real example the candidate has experienced (Tell me about a time you had to set up a spreadsheet for balancing payments).



QUESTION TYPES



We like to focus the majority of our interview questions on behavioral questions. Behavioral questions will give you a better idea of what a candidate knows and how they handle themselves on the job.

Ask participants to walk through questions on teamwork using each of the 4 types of questions. (Direct, Open-Ended, Situational, Behavioral)



PROBING



PROBING

- Silent (eye contact, head nod)
- Nudging
- Asking follow-up questions



Sometimes candidates aren't answering questions as you would like. There are a few tricks to get them to keep talking.

1. Remain silent. The awkwardness of silence works very well. Smile and nod at the candidate and they will most likely fill the silence with more information. (demonstrate)
2. Nudging - give subtle cues to get the person to keep talking. Example could be "That's really interesting, tell me more"
3. Follow-up questions: Keep asking about the response to dig in more.



GOOD QUESTION?



IS THIS A GOOD QUESTION?

You enjoy teamwork and collaboration, correct?

What was the worst part about your last job?

If you could choose a different career, what would it be?

Hand out red/green paddles

Let's review some typical questions - if you think it's a good question, hold up the green side of the paddle, if you think the question could be improved, hold up red.

Go through questions 1 at a time - discuss why group thought good or bad, ask how to make it a better question.



POOR QUESTIONS



STAY AWAY!

- Rarely produce an answer
- Leading questions
- Not job-related

A few are:

Questions that don't really give an answer - example:

Leading questions: "You like to work on a team, right?"

Questions that are not job related: "What do you like to do in your free time?"

On page 28-30 of your learner's guide you will find more examples of questions that you should stay away from.



FAVORITE QUESTIONS



Ask the participants what questions they like to ask and why.

Give personal examples if needed.



SUGGESTIONS



DON'T...

- Talk too much/Interrupt
- Promise the job, bonuses, promotions, etc.
- Give feedback during interview
- Give false expectations
- Forget to keep documentation



Here are some other things to stay away from

- Talking too much: The interview is about the candidate, not about you. The candidate should be doing the majority of the talking.
- Promise the Job/other: Don't tell the candidate that they are going to get a job offer, you shouldn't say that they will be promoted after a certain amount of time or anything similar. Everything is dependent on performance, many people come back and say they were told something in an interview that is not accurate and then there can be issues.
- If a candidate asks for feedback during the candidate, you want to be very generic. Thank them for the time, but don't get into how the interview went or what they could do differently.



SUGGESTIONS



- Similar to promising the job, don't give false expectations - if you are not going to have a decision in the next few days, be honest about that. It makes for a poor candidate experience.
- Documentation! You've heard about this from HR before, but keep notes on your candidates so you can remember the conversations and make a good decision. If you have multiple interviews over the course of a couple of weeks, sometimes it's hard to remember the 1st candidate.



RED FLAGS



INTERVIEWING RED FLAGS

- Constant rescheduling
- Negativity
- Lack of professionalism
- Vague or inconsistent answers
- Demands

Here are some red flags in interviewing:

- **Constant rescheduling:** Sometimes things do come up, but if a candidate has to reschedule interviews multiple times, that is a sign that they may have a hard time sticking to a schedule or that the job is not that important to them.
- **Negativity:** When a person interviews, they should be on their best behavior. If there is a negative tone in interviews, you can expect that will be how they will be on the job.
- **Unprofessional:** Just like for negativity, this is a sign of what's to come if they are hired.



RED FLAGS



- Vague answers: This may show that the candidate is not telling the truth.
- Demands: Already demanding things? Another that shows how they will be as an employee. For example, if they say they really need to work remote and your job is not a work from home position, you will have a problem later on.



QUESTIONS TO BE PREPARED FOR



QUESTIONS TO EXPECT

What is the most challenging part of the job?

Why did the last person leave this position?

What are the day-to-day responsibilities?

Why do you enjoy working here?

At the end of the interview, you should be prepared for candidate questions. Page 32 in your participant guide gives you common questions and potential answers.



INTERVIEW QUESTION ACTIVITY



Our next activity is to create interview questions.

Hand out job descriptions for a position in each of the participant's departments.



WRITING INTERVIEW QUESTION ACTIVITY



Interview Questions

- Review your job description
- Identify KSA's that are applicable to your job
- Write 10 questions relating to the KSA's using different types of interview questions
 - Direct
 - Open-ended
 - Situational
 - Behavioral

Review the job description that was handed out and turn to page 33 of your learners guide.

In your LinkedIn training on recruitment, it talked about KSA's (Knowledge, skills, and abilities). Looking at your job description, what are the KSA's that are applicable to the job and you want to make sure you interview for?

Once you identify your KSA's, write 10 interview questions for this position.

Spend 10-15 minutes on this activity



LUNCH



Change room layout .



MOCK INTERVIEWS



Prior to lunch, we've learned interview structure, types of questions, red flags, and wrote out questions. We are now going to practice!



MOCK INTERVIEWS



GUIDELINES

- Using your 10 questions, you will be interviewing a candidate
- Form groups of 3
 - Interviewer
 - Interviewee
 - Coach

Form groups of 3 - interviewer, interviewee, and a coach

Interviewer - use your 10 questions you created before lunch to interview your candidate

Interviewee - respond to the interviewer's questions, don't make it easy - make the interviewer dig to get answers

Coach - give feedback/help interviewer as needed

Spend 15-20 minutes on this activity



QUESTIONS



PERFORMANCE



The next section is on performance management.



OBJECTIVES



OBJECTIVES

- What is Performance Management?
- OnBoarding
- Resources
- Expectations
- Coaching
- Reviews
- Discipline



Performance Management is a huge topic. Today, we are going to focus on a few things - OnBoarding, Training Resources, Manager Expectations, Coaching, Performance Reviews and Discipline. Each of these topics are full training sessions in themselves, so we are going to be high level on this discussion.



PERFORMANCE



WHERE DID THIS STUFF COME FROM ANYWAY?



Let's watch this video to see where the idea of performance management has come from.



FAMILY FEUD



For our conversation on performance management, we will be playing Family Feud! Everyone in this room has experience and ideas of how to manage performance, this area will be utilizing your thoughts to help everyone. We will all be learning from each other.



FAMILY FEUD



What is Family Feud?



For those of you who are not familiar with Family Feud or need a refresher, here's a video to help you on how the game is played.



FAMILY FEUD



RULES

- 2 Families
 - Pick a head of the family
 - Pick a Family Name
- Head of the family will introduce their family
- Head of the family from each team will come to center to face off to start
- If you get the higher score for your initial answer, you may keep the question or pass to the other team
- Please stand while we are playing the game
- Each new topic will have a different family member face off in the center

Here are our rules.

Read from slide

** Teams are on next slide



FAMILY FEUD



Here are our families!

Have participants move to different tables with their family.

They choose a family name and write it on their sign, tape to front of table.

Put up game board on easel

2nd easel with flip chart/markers. One person (trainer) to write answers on board.

Write family names on white board to track points.



FAMILY FEUD



Transition Slide

Have 1st person from each team come to the front/buzzer



FAMILY FEUD



What are the most commonly owned dog breeds in America



Use this as a practice round.

Game Host will read the question. Person who gives a correct answer worth the most points will choose to pass or play.

Go through team until answers are all up or 3 strikes. If get 3 strikes, move to other team for 1 final answer.

Answers:

1. French Bulldog
2. Labrador Retriever
3. Golden Retriever
4. German Shepherd
5. Poodle



FAMILY FEUD



LET'S PLAY....
FAMILY FEUD!

**PERFORMANCE
MANAGEMENT**

What are words associated
with "performance
management"



Move to next people from each team

Answers:

1. Training and Development
2. Productivity
3. Attendance
4. Accuracy
5. Remote work



FAMILY FEUD



LET'S PLAY....
FAMILY FEUD!

ONBOARDING

What should be included in
a training plan for a new
employee?



Move to next people from each team

Answers:

1. Learn basics of job
2. Job shadow
3. Learn systems
4. Read materials/handbooks
5. Meet team

Discussion topic: What needs to be covered in the 1st week?
1st month?

How long is OnBoarding? What would you like to see out of
OnBoarding/could you implement?



FAMILY FEUD



LET'S PLAY....
FAMILY FEUD!

RESOURCES

What resources do you use
to train employees?



Move to next people from each team

Answers:

1. Trainer/Mentor
2. Job Shadowing
3. Checklists
4. Handbooks
5. Regulations

Discussion: Discuss what you currently use - any other ideas? How do you do it?



FAMILY FEUD



LET'S PLAY....
FAMILY FEUD!

**ESTABLISHING
EXPECTATIONS**

What expectations should a leader cover with an employee?



Move to next people from each team

Answers:

What expectations should a leader cover with employees?

1. Work schedule
2. Attendance/Tardiness
3. Time Management
4. Communication
5. Meetings

Discussion: What do you cover? Other ideas that we can use?



FAMILY FEUD



What does a leader need to do when providing poor performance feedback?



Move to next people from each team

Answers:

How should a leader communicate with employees when providing coaching?

1. Revisit / clarify expectations
2. Give examples
3. Give honest feedback
4. Ask questions
5. Listen

Discussion: Tips/Tricks



FAMILY FEUD



LET'S PLAY....
FAMILY FEUD!

**PERFORMANCE
REVIEWS**

What should be discussed
during a performance review?



Move to next people from each team

Answers:

What should be discussed in a performance review

1. Performance for whole year
2. Successes
3. Goals
4. Improvements needed
5. Expectations

Discussion: What topics do you cover? What's your practice to get completed on time? How do you rate people?



FAMILY FEUD



What are some of the most common topics needing discipline in the workplace?



Move to next people from each team

Answers:

What are the most common areas to discipline in the workplace?

1. Attendance
2. Productivity
3. Accuracy
4. Interpersonal Issues
5. Efficiency

Discussion: How can you manage some of these areas?



FAMILY FEUD



How do you manage performance?



Move to next people from each team

Answers:

1. Set Clear Expectations
2. Communicate
3. Meet with employees regularly
4. Use your resources (WT, checklists, handbooks, SMEs)
5. Guide/Coaching

Discussion: How do you manage your remote workers?

Tools/Tricks/Tips



TRAINING PLANS



It's important for new employees to start off on the right foot, so we have developed the use of 1st week training plans for all employees starting with the company or transferring to a new job.

We have built a spreadsheet template to help you plan your new employees' first week.



TRAINING PLANS



CONSIDERATIONS

- Discuss Job Description
- Discuss expectations
- Lunch
- Meet & Greet
- Meetings
- Job Shadowing
- Leader Check-ins
- What else?

Here are some of the activities that should be taken into consideration during the first week.

Job Description - employees receive their job description in their new hire packet, but HR does not review this with them. That is the leaders' responsibility.

Expectations - What does it mean to you to be late? Right on time? 5 minutes ok? 15? If you don't clarify what your expectations are of employees, you may not be able to hold them accountable at a later time. We hear a lot of frustrations from leaders about employees not doing what the leader expects, we will ask you if you have told them what you are expecting.



TRAINING PLANS



Lunch - it's highly recommended for you to take your new employee to lunch. Depending on the size of your department and budget will determine if you do a team lunch or 1X1.

Meet & Greets - Write a list of who the new employee will interact with on a regular basis. This can be people within your team/department and people in other departments. The idea of meet & greets is to start a relationship, usually I would plan only 15 - 30 minutes for these meetings. This meeting can be discussion on how the 2 will work together, or just getting to know each other on a personal level. If you have a small team, it's encouraged to have individual meet & greets with everyone on the team. Remember these are 1X1, not a group "meet the team".

Meetings - Do you have regular team or department meetings? Make sure to add them to the spreadsheet.

Job Shadowing - Who should they be sitting with and what topics will be covered?

Leader Check-ins: Our recommendation is to have the new employee check in with the leader everyday. They can discuss what they have learned, what they may need more training on and how they are feeling so far.

What other things do you think would be helpful for people during their first week? (Write answers on white board)



TRAINING PLANS



EXAMPLE

Week One Schedule - Courtney Cuffe					
Human Resources Generalist					
	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 AM		Desk Time	Desk Time	Desk Time	Desk Time
8:30 AM					
9:00 AM	Orientation	Meet & Greet - Anna	Meet & Greet - Mariah	Benefits with Anna	OnBase Overview with Katie S
9:30 AM		Desk Time	Meet & Greet - Ali		
10:00 AM		Meet & Greet - Katie S	HR Dept Meeting	Desk Time	Desk Time
10:30 AM		Desk Time		Job Responsibilities with Shawn	Q&A with Shawn
11:00 AM	Set up desk	Job responsibilities/Intern Intros - with Shawn	HR Generalist Meeting	Desk Time	Desk Time
11:30 AM					
12:00 PM	Lunch with Team	Lunch	Lunch	Lunch with Anna	Lunch
12:30 PM					
1:00 PM		Desk Time	ADP Overview with Ali	Desk Time	
1:30 PM	Job Responsibilities/Intern Intros with Shawn	Meet & Greet - Katie P	Performance/Discipline Process with Katie S	Boise Plaza walkabout with Shawn	Desk Time
2:00 PM		Department Overviews with Katie S			
2:30 PM	Check Computer Accesses with Katie S	Desk Time	Park Plaza walkabout with Shawn	Desk Time	
3:00 PM	Desk Time	Desk Time	Desk Time	Desk Time	
3:30 PM					
4:00 PM	Check-in with Shawn	Check-in with Shawn	Check-in with Shawn	Check-in with Shawn	Check-in with Shawn
4:30 PM					
	Desk Time Activities		Week 2		On your own
	Front Porch - review/any ideas to change/improve?		Greg Meet & Greet		Shawn
	G Drive (HR Folders)				Katie S
	Review Org Chart		Week 3-4		Anna
	Review ADP		Meet & Greets/1x1 with leaders		Mariah
	Review OnBase				Katie P
			Set up prior to start		Ali
			OnBase		HR Team
			G Drive		
			DocuSign?		
			Teams		
			ADP		

Here is an example of a training plan that was written for a new member of HR. It's important to note that this is a guideline - things will come up and you may need to move the activities around, that's fine. Just make sure you follow up with anything that is missed.

We recommend that you plan out more than week 1, you should have a guideline on when you will cover topics depending on the position for a few weeks up to the 1st year.



TRAINING PLAN ACTIVITY



Idaho Housing and Finance Association 37



NEW EMPLOYEE TRAINING PLANS



Considerations:

- Discuss Job Description
- Discuss Expectations
- Lunch
- Meet & Greets
- Meetings
- Job Shadowing
- Leader Check-ins
-
-
-
-
-
-



Have group turn to page 37 in the participant guide.

Using the considerations as a starting point, have write in a few more ideas.

After completing the list, fill in pages 39 -41



EXPECTATIONS



We mentioned that clarifying your expectations for new employees is very important.

Does anyone have an example when they did not let someone know their expectations and you got frustrated?



EXPECTATIONS



ACTIVITY

- What are your expectations of your team members?
- Group brainstorming
- Work on your team expectation sheet

Divide into groups of 3-4. Give each a big flip chart paper to write down ideas.

We are going to work together in groups to brainstorm for about 10 minutes.

(Call in, tardiness, contacts, meeting expectations, etc.)

Hang posters on wall and go through them, add others to white board.

Go back to learner guide page 42 and complete for your team.



BREAK



We'll take a break and when we come back it will be time for your presentations!



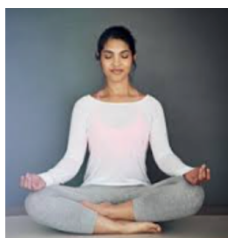
PRESENTATIONS



PRESENTATIONS



JUST BREATHE



1. Stand up straight, shoulder up, head/eyes toward the audience.
2. Keep your hands open down by your side.
3. Smile.
4. Breathe in a deep diaphragmatic breath in feel your stomach expand. Count 3 seconds – 1,2,3.
5. Exhale for a full 3 seconds, count it out 1,2,3.

Many people experience anxiety when they have to get up in front of a group and speak. If you are one of those people, you are definitely not alone.

This is an activity to help you prior to presenting, let's give it a try together.

Everyone stand and go through exercise with group.



PRESENTATIONS



Presentation Agenda

- John Gibbons
- Rod Zacharias
- Sarah Bray
- Erika Zappa
- Alicia Buchan
- Derek Murray
- Sneki Pavlick
- Tanya Hammel
- Yasmine Gonzalez-Rubio
- George Otero
- Jane Roethler



Here is our order for today. You can go up to the front as soon as the person prior to you has completed their presentation.

Please use the forms provided in the learners guide starting on page 45 to give feedback to each presenter to help them improve. I'll collect at the end of the presentations and get them to the right person.



THANK YOU



You did it! You have completed Manager Fundamentals 101. Thank you for spending the past 2 days with me to learn some of the basics of leadership at IHFA. We will be offering many other classes, please reach out if you have a specific training need and we will develop something for you.

Thanks, again!



EXHIBIT 6

Management Fundamentals 101 Learner Guide



MANAGER FUNDAMENTALS

101



Learner Guide





WELCOME



**THIS LEARNER GUIDE IS THE PROPERTY
OF: _____**

In this course, you will learn:

- Role of a Manager at IHFA
- HR Contacts
- HR Forms
- Worktime
- Legal Employment Considerations
- Recruitment
- Performance Management





WHY IHFA?



Why do you work at IHFA?

What is IHFA's Mission?





OPERATING PRINCIPLES & VALUES



- Employees are our greatest resource. We value the contributions of every person and encourage open communications.
- We will be driven by a sense of personal responsibility to do our work to the best of our ability. Meeting our responsibilities will be a way of life, not a means to gain reward.
- We will serve our customers with dedication, courtesy, concern, respect, and responsiveness.
- We will pioneer innovative, creative, cutting-edge ways to do our work, focusing on results, not processes.
- We will be accountable for our results.
- Though we are an organization with unique business units and diverse geographic locations, we are members of one team. We will be mutually cooperative, collaborative, and supportive of co-workers' needs and programs.
- We will be fair, ethical, honest, and professional.
- We will not be complacent with our past successes. We will take reasonable risks.





WHAT IS A MANAGER?



What makes a manager?

What is a _____?





WHO DOES WHAT?



Circle who is responsible for each topic

Performance/Coaching: **Manager** **HR**

Employee Development: **Manager** **HR**

Discipline: **Manager** **HR**

Terminations: **Manager** **HR**

Benefits: **Manager** **HR**

FMLA/ADA: **Manager** **HR**

Recruiting: **Manager** **HR**

Budgets/Financials: **Manager** **HR**





HR FORMS



FMLA PROCESS:

ADA PROCESS:

WORKERS COMP PROCESS:



LEGAL CONSIDERATIONS



EMPLOYMENT AT WILL

- Employer or employee can terminate at any time
- Keep documentation
- Implications for unemployment



Notes:





LEGAL CONSIDERATIONS



EQUAL EMPLOYMENT OPPORTUNITY

- Prevents discrimination in employment
- Based on Title VII of Civil Rights Act
- Protected Classes
 - Race, Color, Religion, Sex (including pregnancy, gender identity, and sexual orientation), national origin, disability, age (40 or older), or genetic information



Notes:





LEGAL CONSIDERATIONS



FAIR LABOR STANDARDS ACT (FLSA)

- Establishes minimum wage, overtime pay, recordkeeping, and youth employment standards affecting employees
- Salary (Exempt) vs. Hourly (Non-exempt)
- Overtime



Notes:





LEGAL CONSIDERATIONS



OVERTIME

- Only eligible for non-exempt employees
- IHFA work week: Saturday - Friday
- Worked hours over 40 per week
- Watch for vacation and sick time on time cards



Notes:





LEGAL CONSIDERATIONS



FAMILY AND MEDICAL LEAVE ACT (FMLA)

FMLA requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to eligible employees for the following reasons:

- For incapacity due to pregnancy, prenatal medical care or child birth;
- To care for the employee's child after birth, or placement for adoption or foster care;
- To care for the employee's spouse, son or daughter, or parent, who has a serious health condition;
- For a serious health condition that makes the employee unable to perform the employee's job

Contact your HR
Business Partner /
Specialist to
partner with you
on FMLA

Notes:





LEGAL CONSIDERATIONS

AMERICANS WITH DISABILITIES ACT (ADA)

- Prohibits discrimination against individuals with disabilities
- Who is an "individual with a disability?"
 - Physical or mental impairment that substantially limits one or more major life activities
- Reasonable Accommodation
 - Must be able to perform essential job functions
 - Cannot provide an undue hardship to company
- Interactive Process will be led by HR



AMERICANS WITH DISABILITIES ACT (ADA)

- When is an employer "on notice"?
 - When request for reasonable accommodation is made
 - Reasonable belief that accommodation is needed to a known disability that is affecting job performance
 - Not expected to assume that someone has a disability or guess what accommodation is needed



Notes:





LEGAL CONSIDERATIONS



WORKERS COMPENSATION

- Established to provide partial medical care and income protection to employees who are injured or become ill from their job
- Injury happens at work
- Employee to see a provider if needed
- Contact HR Business Partner/Specialist



Notes:





LEGAL CONSIDERATIONS



RESPECTFUL WORKPLACE

- Improves communication, teamwork, productivity, knowledge sharing, and job satisfaction
- Harassment
 - Protected classes under Title VII of Civil Rights Act
- Hostile Work Environment
- Workplace Violence
- Promote Diversity, Equity, and Inclusion

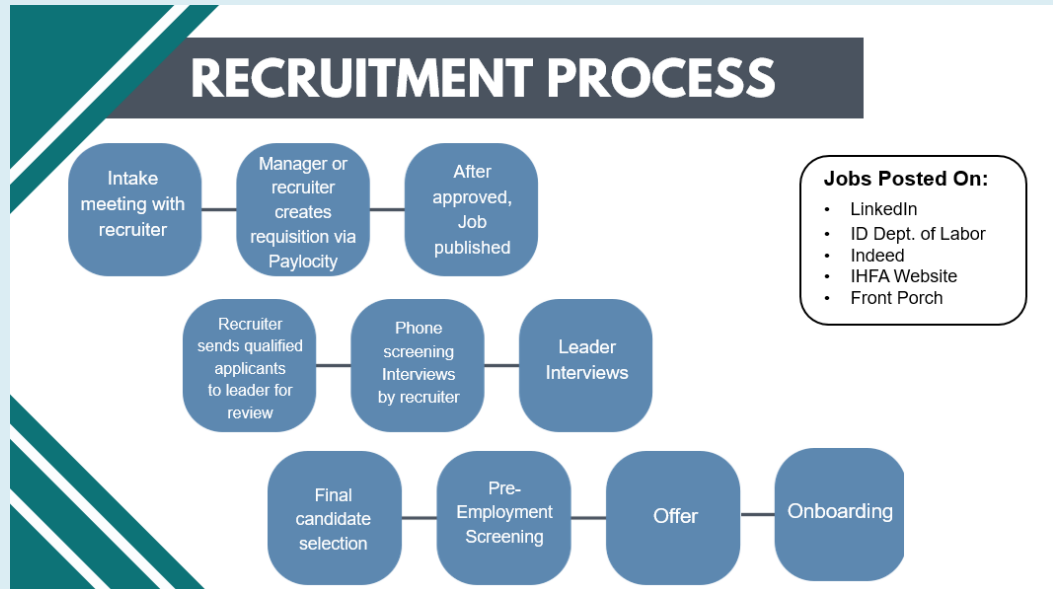


Notes:





RECRUITMENT



Expectations:

- Update job description
- Allow one week after job posting to receive resumes
- Respond within 24 hours to resumes sent
- Interview all internal candidates

Notes:





RECRUITMENT



Manager Intake Questions

1. Can you describe to me a general overview _____ department (and/or position, 1-2 sentences) Please describe as if you were speaking to someone who is new to the organization.
2. What does your ideal candidate look like? Or what specific qualities are you looking for?
3. What are the absolute MUST have's? (willing to train?)
4. Do you want me to send you all of the resume's that come through? Or just send you the ones after I do my first initial screening interview?
5. Is there anyone else you want to be in the second interview?
6. Do you have a location preference for your interviews? (Teams, In-person, preference to candidate?)
7. Is this an in-person position or are there opportunities for remote work? How long will they need to be in the office full time before given that opportunity?





RECRUITMENT



Internal Recruitment

After Decision is made from internal interview



-
-
-
-

-
-
-

Notes:





RECRUITMENT



What red flags can you find on these resumes?

CLAUDIA ALVES

ADMINISTRATIVE ASSISTANT

Dedicated Administrative Assistant with experience providing administrative support to various stakeholders, accompanied by a proven track record of maintaining efficient office operations.

hello@reallygreatsite.com +123-456-7890 123 Anywhere St., Any City

SKILLS

- Oral and Written skills
- Organized
- Time-Efficient
- Efficient with Microsoft and Google Suite
- Creativity

EDUCATION

Boise State University
August 2020 - Present

Borah High School
2016 - 2020

WORK EXPERIENCE

Office Assistant

Boise State Admissions Office
April 2022 - May 2023

- Assisted in filing and mailing administrative duties
- Created positive customer experiences over the phone and in-person

Server

Olive Garden
September 2020 - March 2021

- Greeted and managed customers and their requests
- Managed numerous stakeholders including management, staff, and customers.





RECRUITMENT



ADELINE PALMERSTON

CUSTOMER SERVICE REPRESENTATIVE

📍 123 Anywhere St., Any City
 ☎ +123-456-7890
 ✉ hello@reallygreatsite.com

CAREER OVERVIEW

Customer service representative committed to providing high-quality service and superior guest experiences. Positive and infectious personality with excellent interpersonal and relationship-building skills. Enhances customer experiences by employing service-oriented behaviors, understanding customer desires and providing customized solutions to build loyalty.

EDUCATION

Ph.D Economics
 Boston University
 2020 - 2023

Masters of Business Administration
 University of Texas
 2018 - 2020

Bachelor of Business Administration
 Boise State University
 2014 - 2018

EXPERIENCE

Research
 Boston University
 August 2021 - May 2023

- Analyzed and tested customer service techniques, efficiency, and customer satisfaction.
- Collaborated with staff to develop artificial intelligence

Adjunct Professor
 University of Texas
 August 2019 - May 2020

- Educated students on concepts of business and customer interactions
- Developed effective curriculum





RECRUITMENT



KYRIE JENKINS

ADMINISTRATIVE ASSISTANT

PROFILE

Dedicated Administrative Assistant with experience providing administrative support to various stakeholders, accompanied by a proven track record of maintaining efficient office operations.

EDUCATION

High School Diploma
Borah High School
2017 - 2021

CONTACT

+123-456-7890
hello@reallygreatsite.com

WORK EXPERIENCE

January 2023 - May 2023

Office Assistant
U.S. Bank

- Scheduled and proctored team meetings
- Filed paperwork and assisted in mailing tasks

June 2022 - December 2022

Receptionist
Holiday Inn Express

- Managed incoming and outgoing calls and requests
- Facilitated hotel bookings and placements of guests

November 2021 - June 2022

Receptionist
Hyatt Place Boise

- Created positive environments for guests
- Managed incoming and outgoing calls and requests

July 2021 - October 2021

Server
Red Robin

- Served customers with excellent customer service
- Multitasked my duties and customer requests





RECRUITMENT



JACOB MIRANDA

CUSTOMER SUPPORT SPECIALIST



Contact



123 Anywhere St., Any City



+123-456-7890



www.reallygreatsite.com



hello@reallygreatsite.com



Skills

- Maintenance knowledge
- Hardworking
- Patience
- Multitasker
- Piano and musical expertise

About Me

A high school graduate with multiple levels of work experience. I have assisted in various fields of work, helping create positive environments.



Education

High School Diploma

2017-2021

Jefferson High School



Work Experience

Lawn Care

2022 - Present

Smith Mowing Co.

- Assisted in mowing lawns and landscaping
- Provided assistance and training to new coworkers.

Painter

2020 - 2021

Smith Painting Co.

- Assisted in painting houses, fences, and structures.
- Added to positive team environment.



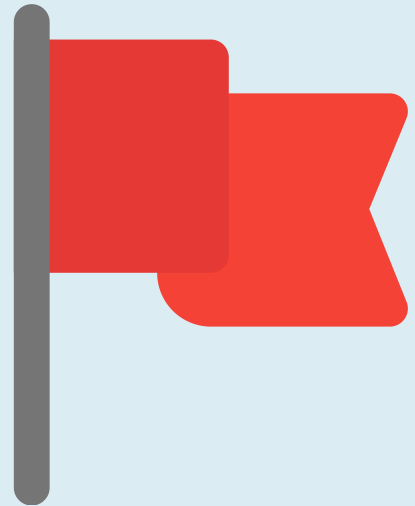


RECRUITMENT



Resume Red Flags:

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Look for this in resumes:

-
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INTERVIEWING



Prep for Interview

1. _____

Job details
Svade Kleid is a bridal boutique located in beautiful Savannah, Georgia. We love making dresses almost as much as we love making brides happy! Just as our dresses are top-of-the-line, our social media pages need to be as unique and irresistible as our gowns.

Our social media manager will be in charge of all social media pages across multiple platforms—expanding our digital presence, developing new strategies, and monitoring our online success through KPIs. Our ideal candidate is a great collaborator who has experience running campaigns with a dynamic team across departments.

About the company
Svade Kleid delights in designing the best dresses for brides and bridal parties across the U.S. Our stunning dresses, loving Southern hospitality, and commitment to our customers has earned us features in Brides magazine, and the Best Bridal Salon award from TheKnot four years in a row. Our goal is to make you and your entire bridal party feel magical on one of the biggest days of your life.

Responsibilities

- Forge a strong knowledge of wedding industry news and social media trends
- Strategize social media campaigns to boost sales and brand engagement
- Partner with marketing team to develop a consistent brand across all social platforms
- Craft a content calendar as needed in collaboration with design and marketing depts
- Design original posts, tweets, and pins according to the content calendar
- Host monthly community engagement events through social pages
- Answer customer questions on social pages daily
- Monitor KPI progress using Google Analytics
- Communicate metrics progress to stakeholders and relevant teams
- Identify potential pitfalls in social strategy or content and adjust future plans accordingly
- Build relationships with followers through consistent communication via comments,

2. _____

Interview Questions
Amanda Todd 05/30/2023

1. Are you able to be at the office Monday- Friday from 8-5?
2. What are your goals 5 years from now?
3. How have you dealt with conflict with a coworker and what was the result?
4. What accomplishment in previous roles are you most proud of?

3. _____

AMANDA TODD
Senior Product Manager
+1-857-791-5789 | @lizabteh.todd@gmail.com | linkedin.com/in/lizabteh-t-146d

EXPERIENCE

Senior Product Manager
S-Health
2018 - 2020 | Berkeley, CA
S-Health was a startup developing a new app that provides tips, advice, and assistance on women's health that reestablished in 2017.

- Developed the go-to-market launch plan and product roadmap
- Pitched the idea to investors in Silicon Valley
- Received and managed a \$12 million project budget
- Led a team of 8 developers and designers to create and maintain the app
- Increased paid customers from 50 to 4,500 in 2 months' time
- Sold the app to Johnson & Johnson for \$12.5 million in 2020

Product Manager
McDonald's USA
2014 - 2018 | San Francisco, CA
McDonald's Corporation is an American fast food company with locations all around the globe. I managed the development of the North-American McDonald's mobile app.

- Managed a \$750k yearly budget
- Conducted a survey among 3 million loyal customers
- Analyzed the data and created a product roadmap
- Set a goal to have the app reach at least 50% of the surveyed customers in year 1 and surpassed it by 15%
- Prioritized new features based on user feedback and metrics
- The app was the most downloaded iOS and Android app in 2017 and is estimated to have increased sales by 48% in 2017-2018

Associate Product Manager
Sony Group Corporation
2010 - 2014 | San Francisco, CA
Sony is a Japanese multinational conglomerate. It operates as one of the world's largest manufacturers of consumer and professional electronic products.

- Co-managed a \$30M budget for the development of the PS4
- Analyzed product metrics for growth and troubleshooting
- Discovered a serious flaw in the design that would cause the consoles to overheat by analyzing data from various tests
- Surveyed 80K gamers and created console & game bundles
- With the help of the bundles 10% of all sales. Sony was able to reach their goal of selling 100M consoles in the first month.

EDUCATION

B.S. Business and Entrepreneurship
UC Berkeley
2004 - 2009 | Berkeley, CA
• Major in Business with a strong focus on entrepreneurship in the IT sector

ACHIEVEMENTS

- **Helped Sony sell 100M PS4s**
Sony reached their goal of selling 100M PS4s in part thanks to the console & game bundles the team & I created.
- **Developed and sold a startup**
Developed a women's health startup from scratch, exited in 2020.
- **App with 20 mln+ downloads**
Led the development of the NA McDonald's app.

MY TIME

- 1 Product roadmap planning
- 2 Mentoring and coaching my team of 8
- 3 Cooking quesadillas with my cat
- 4 Talking to users

TRAINING / COURSES

- Introduction to Computer Science and Programming with Python (MIT, 2018)
- Data analytics Insights and basic programming skills through hands-on assignments.
- UX/UIX Design (CALA&TS, 2016)
- Research, design, and prototype-effective, visually-driven websites and apps.

4. _____

Candidate questions to expect/prepare for

Why do you work at Idaho Housing?

- Be honest
- Think about this ahead of time to have your answer prepared
- It's always good to reference mission and company values

What do you see as the biggest challenges/room for improvement for this position/team?

- Be honest and transparent, but give specific examples. End on a positive note, as that's what the interviewee remembers

Why did the last person leave this position?

- Avoid negative or personal situations
- Fair answer, "They decided to move on to other opportunities."

What major skills and abilities will I need for this job?

- Reference skills from job description; focus on hard skills

How will my performance be measured?

- Explain formal performance review process
- Explain performance is an ongoing process

What are the day-to-day responsibilities? What is the organization's plan for the near future?

- Give a high level explanation of job functions
- Don't make it sound like something it's not, be very clear and transparent





INTERVIEWING



Interview Structure

- 1.
2.
 - a.
 - b.
 - c.
- 3.
- 4.

Types of Questions

Direct:

Open-Ended:

Situational:

Behavioral:





INTERVIEWING



Effective Interviewer's Strategy

To be an effective interviewer, there are 4 things you must do:

- Guide:** Guide and control the interview to cover the areas *you* desire.
- Listen:** Listen carefully to the candidate's responses and observe the kind of self-image being projected. A good interviewer should listen about 80% of the time, and talk only 20%!
- Evaluate:** Using *pattern recognition* techniques, form a comprehensive picture of the candidate from the small details; pay attention to things *not said*, as well as what is said. How does that picture compare with job requirements profile?
- Communicate:** Communicate your evaluation in detail with other decision makers. Focus on the candidate's background, job requirement strengths and weaknesses, and other relevant hiring criteria.





INTERVIEWING



Probing

Silent:

Nudging:

Follow-up questions:

Questions to avoid

- Doesn't produce an answer
- Leading questions
- Not job-related

Other things to avoid

- Talking too much
- Promises/false expectations
- Giving feedback

Keep Documentation!



HR Insights

Interviews: What's Illegal to Ask?

Federal and state laws generally require employers to limit their interview questions to those that are essential for determining if a person is qualified for the job. In general, employers should not ask about race, gender, religion, marital status, national origin or age because that information is irrelevant in determining if an applicant is qualified for the job. Also, federal law expressly prohibits employers from making pre-employment inquiries about an applicant's disability.

Illegal interview questions are those that single an individual out for reasons that are contrary to employment anti-discrimination laws. It is prohibited to ask these questions in any context, but if a question has discriminatory implications or employment is denied based on the applicant's answer, the employer may have broken the law. As an overall rule, employers should limit their interview questions to those that are job-related and should discourage applicants from providing unsolicited personal information.

The following are examples of illegal or inadvisable questions and some acceptable alternatives.

Subject: Marital Status/Family

- **Illegal Questions:** What is your marital status? What does your husband/wife do? Do you plan to have a family? How many kids do you have? How old are your children? What are your child care arrangements?
- **Acceptable Job-related Questions:** Employers may ask whether an applicant can meet specified work schedules or has activities or commitments that may prevent him or her from meeting attendance requirements. These questions must be based on a business

necessity and asked of all applicants for the position. For example—what hours can you work? Can you work on weekends and holidays? Are you willing to relocate if necessary? Are you willing to travel as needed for the job? Are you willing and able to work overtime as necessary?

Subject: Economic Status

- **Illegal Questions:** Do you own a car? Do you rent or own a house? What is your credit rating? Have you ever declared bankruptcy? Have your wages ever been garnished?
- **Acceptable Job-related Questions:** Questions about the financial status of an applicant should be avoided, unless the information is essential to the job. For example, rather than inquiries related to an applicant owning a car, an employer may ask if the candidate will have problems getting to work by 8 a.m.

Subject: Pregnancy

Illegal Questions: Questions relating to pregnancy and medical history concerning pregnancy. For example—are you able to have children? Do you plan to have more children?

- **Acceptable Job-related Questions:** General inquiries about job history and tenure or anticipated absences that are made to males and females alike.

Subject: Physical Health

- **Illegal Questions:** Employers generally cannot ask disability-related questions or require medical examinations until after an applicant has been given a conditional job offer. For example, the following interview questions should be avoided—do you have any health conditions? Are you taking prescribed drugs? Have you ever been treated for a mental health condition? How many sick days did you take last year? Have you ever filed a worker’s compensation claim?
- **Acceptable Job-related Questions:** An employer may ask an applicant whether he or she is able to carry out the essential functions of the job (with or without reasonable accommodation), if this question is asked of all applicants. Employers are permitted to ask limited questions about reasonable accommodations if they rationally believe that the applicant may need accommodations. This is also true when the applicant has disclosed a need for accommodations.

Subject: Name

- **Illegal Questions:** Any inquiries about an individual’s name that would indicate marital status, birthplace, ancestry or national origin. For example—you have an unusual name, what does it mean?
- **Acceptable Job-related Questions:** It’s permissible to ask whether an applicant’s work records are under another name. For example – Have you worked for this company under another name? By what name do your references know you?

Subject: Gender

- **Illegal Questions:** Any inquiry that relates to an applicant’s sex, unless it is a bona fide occupational qualification and is essential to the position. For example—do you wish to be

addressed as Mr., Mrs., Miss or Ms.? What is your spouse’s name?

- **Acceptable Job-related Questions:** None, unless sex is a bona fide occupational qualification and is essential to the position.

Subject: Photographs

- **Illegal Questions:** Requests that an applicant submit a photo at any time prior to hiring.
- **Acceptable Job-related Questions:** None, however, photos may be requested after hiring for identification purposes.

Subject: Age

- **Illegal Questions:** Any question that tends to identify applicants age 40 or older. For example—how old are you? When did you graduate from high school or college? What is your birthday? Also, requests for a birth certificate are illegal before employment.
- **Acceptable Job-related Questions:** If age is a legal requirement for a job, employers can inform applicants of the legal age requirement (for example, must be 21 to hold a specific license) and ask if they will be able to provide proof of meeting the age requirement if hired.

Subject: Education

- **Illegal Questions:** Any question that specifically asks about the nationality, racial or religious affiliation of schools attended.
- **Acceptable Job-related Questions:** Questions related to academic, vocational or professional education of an applicant, including the names of the schools attended, degrees/diplomas received and courses of study. For example—what is the highest level of education you have completed?

Subject: U.S. Citizenship

- **Illegal Questions:** Asking whether an applicant is a U.S. citizen.
- **Acceptable Job-related Questions:** Because of potential claims of illegal discrimination, employers should verify eligibility to work in the U.S. after an offer to hire has been made. Applicants may be informed of this

requirement in the application process by adding the following statement on the employment application: "In compliance with federal law, all persons hired will be required to verify identity and eligibility to work in the U.S. and to complete the required employment eligibility verification document form upon hire."

Subject: National Origin/Ancestry

- **Illegal Questions:** What is your nationality? How did you acquire the ability to speak, read or write a foreign language? How did you acquire familiarity with a foreign country? What language is spoken in your home? What country are your parents from?
- **Acceptable Job-related Questions:** What languages do you speak, read or write fluently? This is only permissible when the inquiry is based on a job requirement.

Subject: Race

- **Illegal Questions:** Any question that directly or indirectly relates to an applicant's race. For example—what is your race? What is your complexion?
- **Acceptable Job-related Questions:** None.

Subject: Religious Affiliation or Beliefs

- **Illegal Questions:** Any question that directly or indirectly relates to an applicant's religious affiliation or beliefs, unless the religion is a bona fide occupational qualification for the position. For example—what religious holidays do you observe? What church do you attend? Also, employers should not ask for references from religious leaders (for example, minister, rabbi, priest, imam or pastor).
- **Acceptable Job-related Questions:** Generally, employers should not ask interview questions related to religious affiliation or beliefs. Certain religious corporations, associations, educational institutions or societies are exempt from federal employment discrimination laws when it comes to the employment of individuals based on their particular religion. In other words, an employer whose purpose and

character is primarily religious is permitted to lean toward hiring persons of the same religion.

Subject: Organizations

- **Illegal Questions:** Which organizations, clubs, societies or lodges do you belong to?
- **Acceptable Job-related Questions:** Which professional organizations do you belong to which you consider relevant to your ability to perform this position? These inquiries must only relate to the applicant's professional qualifications.

Subject: Military

- **Illegal Questions:** What type of military discharge did you receive? When?
- **Acceptable Job-related Questions:** Inquiries concerning education, training or work experience in the U.S. Armed Forces. For example—what type of training or education did you receive in the military that would be relevant to this position?

Subject: Height & Weight

- **Illegal Questions:** Any inquiries not based on actual job requirements should be avoided. For example—how tall are you? How much do you weigh?
- **Acceptable Job-related Questions:** Inquiries about the ability to perform the essential functions of the job.

Subject: Criminal Record

- **Illegal Questions:** Inquiries relating to arrests or convictions. For example—have you ever been arrested for a crime? (The fact that a person was arrested does not mean he or she engaged in criminal conduct.) Many states have adopted "ban the box" laws that prohibit inquiries concerning criminal history until after a conditional job offer has been made.
- **Acceptable Job-related Questions:** After a conditional job offer has been made, an employer may inquire about an applicant's criminal history. Hiring decisions must be made based on how the criminal history relates to the position. Some states also limit how many years back an employer may look into a candidate's criminal history.

Subject: Sexual Orientation

- **Illegal Questions:** Any inquiries directly or indirectly related to sexual orientation or gender identity. For example—what is your sexual orientation? What is your spouse's gender? Whom do you live with? Do you identify yourself as a man or a woman?
- **Acceptable Job-related Questions:** None.

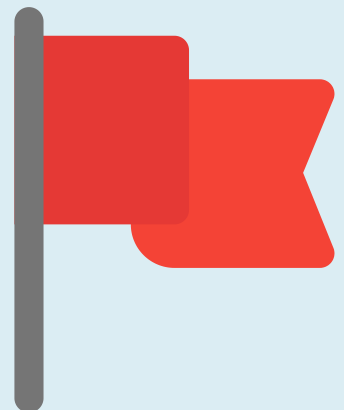
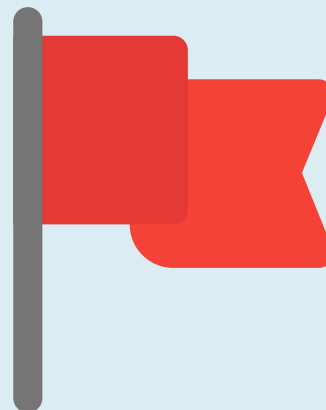
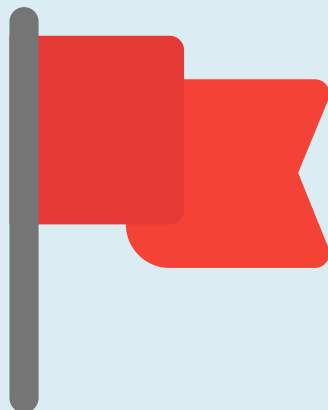


INTERVIEWING



Interviewing Red Flags:

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QUESTIONS TO EXPECT



Why do you work at Idaho Housing?

- Be honest
- Think about this ahead of time to have your answer prepared
- It's always good to reference mission and company values

What do you see as the biggest challenges/room for improvement for this position/team?

- Be honest and transparent, but give specific examples. End on a positive note, as that's what the interviewee remembers

Why did the last person leave this position?

- Avoid negative or personal situations
- Fair answer, "They decided to move on to other opportunities."

What major skills and abilities will I need for this job?

- Reference skills from job description; focus on hard skills

How will my performance be measured?

- Explain formal performance review process
- Explain performance is an ongoing process

What are the day-to-day responsibilities? What is the organization's plan for the near future?

- Give a high level explanation of job functions
- Don't make it sound like something it's not, be very clear and transparent

What is the organization's plan for the near future?

- Talk about your department/team, reference specific metrics and goals
- Reference mission/values

What is the typical career path for someone in this role?

- Be honest about the possibilities of career growth in this position
- Talk about the organization as a whole and opportunities to advance throughout the company
- Don't make promises





INTERVIEW QUESTIONS



Job Title:	
Knowledge	
Skills	
Abilities	





INTERVIEW QUESTIONS



Interview Questions	
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	





PERFORMANCE MANAGEMENT



OnBoarding:

Resources:

Expectations:





PERFORMANCE MANAGEMENT



Coaching:

Reviews:

Discipline:





NEW EMPLOYEE TRAINING PLANS



Considerations:

- **Dicuss Job Description**
- **Discuss Expectations**
- **Lunch**
- **Meet & Greet**
- **Meetings**
- **Job Shadowing**
- **Leader Check-ins**
-
-
-
-
-
-
-
-





NEW EMPLOYEE TRAINING PLANS



Example

Week One Schedule - Courtney Cuffe					
Human Resources Generalist					
	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 AM		Desk Time	Desk Time	Desk Time	Desk Time
8:30 AM	Orientation	Desk Time	Desk Time	Desk Time	Desk Time
9:00 AM		Meet & Greet - Anna	Meet & Greet - Mariah	Benefits with Anna	OnBase Overview with Katie S
9:30 AM		Desk Time	Meet & Greet - Ali		
10:00 AM		Meet & Greet - Katie S	HR Dept Meeting	Desk Time	Desk Time
10:30 AM		Desk Time		Job Responsibilities with Shawn	Q&A with Shawn
11:00 AM		Job responsibilities/Intern Intros - with Shawn	HR Generalist Meeting		
11:30 AM	Set up desk			Desk Time	Desk Time
12:00 PM	Lunch with Team	Lunch	Lunch	Lunch with Anna	Lunch
12:30 PM					
1:00 PM		Desk Time	ADP Overview with Ali	Desk Time	Desk Time
1:30 PM	Job Responsibilities/Intern Intros with Shawn	Meet & Greet - Katie P	Performance/Discipline Process with Katie S	Boise Plaza walkabout with Shawn	
2:00 PM	Check Computer Accesses with Katie S	Department Overviews with Katie S			
2:30 PM		Desk Time	Park Plaza walkabout with Shawn	Desk Time	
3:00 PM	Desk Time				
3:30 PM					
4:00 PM	Check-in with Shawn	Check-in with Shawn	Check-in with Shawn	Check-in with Shawn	Check-in with Shawn
4:30 PM					
	Desk Time Activities		Week 2		On your own
	Front Porch - review/any ideas to change/improve?		Greg Meet & Greet		Shawn
	G Drive (HR Folders)				Katie S
	Review Org Chart		Week 3-4		Anna
	Review ADP		Meet & Greets/1X1 with leaders		Mariah
	Review OnBase				Katie P
			Set up prior to start		Ali
			OnBase		HR Team
			G Drive		
			DocuSign?		
			Teams		
			ADP		





NEW EMPLOYEE TRAINING PLANS



Day 1:

Day 2:

Day 3:

Day 4:

Day 5:





NEW EMPLOYEE TRAINING PLANS



	Monday	Tuesday	Wednesday
8:00	ORIENTATION		
8:30			
9:00			
9:30			
10:00			
10:30			
11:00			
11:30			
12:00			
12:30			
1:00			
1:30			
2:00			
2:30			
3:00			
3:00			
4:00			
4:30			





NEW EMPLOYEE TRAINING PLANS



	Thursday	Friday
8:00		
8:30		
9:00		
9:30		
10:00		
10:30		
11:00		
11:30		
12:00		
12:30		
1:00		
1:30		
2:00		
2:30		
3:00		
3:00		
4:00		
4:30		





TEAM EXPECTATIONS



- Attendance:
- Chain of Command:
- Communication:
- Dress Code:
- Training:
- Contacts:
-
-
-
-
-
-
-
-
-





TEAM EXPECTATIONS



Example

Expectations:

Attendance:

Regular attendance and office hours are expected. I'm generally flexible with flexing time as needed for doctor appointments, personal errands, and family needs. Please don't take advantage or I will adjust as needed. With that, the team needs to take care of themselves – if you are sick, stay home and get better. When you want/need to take a vacation, take a vacation (make sure you have time accrued and it works with our schedules). Your physical and mental well-being are very important to me and the team.

If you will be out sick, please text Katie at [REDACTED] as soon as you can.

If you are running late, send a text to Katie if you will be more than 15 minutes late. (I worry)

Vacation days should be planned in advance and coordinated on the calendar around set trainings. Let me know as soon as you can if you are planning a vacation.

Chain of Command:

The training and development team is led by Katie Shamy. As an employee on the team, she should be your first stop for questions.

Shawn Hafer is Katie's manager, he's the Director of Human Resources. If Katie is not available, he's your next level.

The HR team reports into Greg Blake. Greg is the CIO and VP of Administration. IT and Marketing and Communications all report to his business unit.

Communication:

Regular Meetings: We will hold weekly team meetings to discuss progress, challenges, and upcoming tasks. Each member of the team will have a separate 1X1 meeting with the manager.





PRESENTATION ORDER



- John Gibbons
- Rod Zacharias
- Sarah Bray
- Erika Zappa
- Alicia Buchan
- Derek Murray
- Sneki Pavlick
- Tanya Hammel
- Yasmine Gonzalez-Rubio
- George Otero
- Jane Roethler



Manager Fundamentals 101

Week 8: Presentation Feedback

Presenter Name:

Three things that worked well or I learned from the presentation

1.

2.

3.

Three things about the presentation that could use improvement

1.

2.

3.

Manager Fundamentals 101

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2.

3.

Three things about the presentation that could use improvement

1.

2.

3.



Thank
you!





RESOURCES



The following pages are resources for you to refer to on employment legal considerations. Please reach out to your HR Business Partner/Specialist for any questions.



HR Insights

Americans with Disabilities Act: Questions and Answers

The Americans with Disabilities Act (ADA) gives civil rights protections to disabled individuals that are similar to those provided to on the basis of race, color, sex, national origin, age and religion. It guarantees equal opportunity for disabled individuals in public accommodations, employment, transportation, state and local government services and telecommunications. The following are questions frequently asked by employers regarding the ADA.

Q. What employers are covered by the ADA, and when is the coverage effective?

A. The employment provisions of title I of the ADA apply to private employers, state and local governments, employment agencies and labor unions. Employers with 15 or more employees are covered.

In addition, the employment practices of state and local governments of any size are covered by title II of the ADA. The standards to be used under title II for determining whether employment discrimination has occurred depend on whether the public entity at issue is also covered by title I. If the public entity is covered by title I, then title I standards will apply. If not, the standards of section 504 of the Rehabilitation Act will apply.

Q. What practices and activities are covered by the employment nondiscrimination requirements?

A. The ADA prohibits discrimination in all employment practices, including job application procedures, hiring, firing, advancement, compensation, training and other terms, conditions and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave,

fringe benefits and all other employment-related activities.

Q. Who is protected from employment discrimination?

A. Employment discrimination is prohibited against "qualified individuals with disabilities." A person discriminated against because he or she has a known association or relationship with a disabled individual is also protected. The ADA defines an "individual with a disability" as a person who has a physical or mental impairment that substantially limits one or more major life activities, has a record of such an impairment or is regarded as having such an impairment.

The first part of the definition makes clear that the ADA applies to persons who have substantial, as distinct from minor, impairments, and that these must be impairments that limit major life activities such as seeing, hearing, speaking, walking, breathing, performing manual tasks, learning, caring for oneself and working. An individual with epilepsy, paralysis, a substantial hearing or visual impairment, mental retardation or a learning disability would be covered, but an individual with a minor, nonchronic condition of short duration, such as a sprain, infection or broken limb, generally would not be covered.



WAGE AND HOUR DIVISION
UNITED STATES DEPARTMENT OF LABOR

Fact Sheet #17A: Exemption for Executive, Administrative, Professional, Computer & Outside Sales Employees Under the Fair Labor Standards Act (FLSA)

Revised September 2019

***Note:** The Department of Labor revised the regulations located at 29 C.F.R. part 541 with an effective date of January 1, 2020. WHD will continue to enforce the 2004 part 541 regulations through December 31, 2019, including the \$455 per week standard salary level and \$100,000 annual compensation level for Highly Compensated Employees. The final rule is available at: <https://www.federalregister.gov/documents/2019/09/27/2019-20353/defining-and-delimiting-the-exemptions-for-executive-administrative-professional-outside-sales-and>.

This fact sheet provides general information on the exemption from minimum wage and overtime pay provided by Section 13(a)(1) of the FLSA as defined by Regulations, [29 C.F.R. Part 541](#).

The [FLSA](#) requires that most employees in the United States be paid at least the [federal minimum wage](#) for all hours worked and [overtime pay](#) at not less than time and one-half the regular rate of pay for all hours worked over 40 hours in a workweek.

However, Section 13(a)(1) of the FLSA provides an exemption from both [minimum wage](#) and [overtime pay](#) for employees employed as bona fide executive, administrative, professional and outside sales employees. Section 13(a)(1) and Section 13(a)(17) also exempt certain computer employees. To qualify for exemption, employees generally must meet certain tests regarding their job duties and be paid on a salary basis at not less than \$684^{*} per week. Employers may use nondiscretionary bonuses and incentive payments (including commissions) paid on an annual or more frequent basis, to satisfy up to 10 percent of the standard salary level. Job titles do not determine exempt status. In order for an exemption to apply, an employee's specific job duties and salary must meet all the requirements of the Department's regulations.

See other fact sheets in this series for more information on the exemptions for [executive](#), [administrative](#), [professional](#), [computer](#) and [outside sales](#) employees, and for more information on the [salary basis](#) requirement.

Executive Exemption

To qualify for the executive employee exemption, all of the following tests must be met:

- The employee must be compensated on a [salary basis](#) (as defined in the regulations) at a rate not less than \$684^{*} per week;
- The employee's primary duty must be managing the enterprise, or managing a customarily recognized department or subdivision of the enterprise;
- The employee must customarily and regularly direct the work of at least two or more other full-time employees or their equivalent; and
- The employee must have the authority to hire or fire other employees, or the employee's suggestions and recommendations as to the hiring, firing, advancement, promotion or any other change of status of other employees must be given particular weight.

Administrative Exemptions

To qualify for the administrative employee exemption, all of the following tests must be met:

- The employee must be compensated on a salary or fee basis (as defined in the regulations) at a rate not less than \$684* per week;
- The employee's primary duty must be the performance of office or non-manual work directly related to the management or general business operations of the employer or the employer's customers; and
- The employee's primary duty includes the exercise of discretion and independent judgment with respect to matters of significance.

Professional Exemption

To qualify for the **learned professional** employee exemption, all of the following tests must be met:

- The employee must be compensated on a salary or fee basis (as defined in the regulations) at a rate not less than \$684* per week;
- The employee's primary duty must be the performance of work requiring advanced knowledge, defined as work which is predominantly intellectual in character and which includes work requiring the consistent exercise of discretion and judgment;
- The advanced knowledge must be in a field of science or learning; and
- The advanced knowledge must be customarily acquired by a prolonged course of specialized intellectual instruction.

To qualify for the **creative professional** employee exemption, all of the following tests must be met:

- The employee must be compensated on a salary or fee basis (as defined in the regulations) at a rate not less than \$684* per week;
- The employee's primary duty must be the performance of work requiring invention, imagination, originality or talent in a recognized field of artistic or creative endeavor.

Computer Employee Exemption

To qualify for the computer employee exemption, the following tests must be met:

- The employee must be compensated **either** on a salary or fee basis (as defined in the regulations) at a rate not less than \$684* per week **or**, if compensated on an hourly basis, at a rate not less than \$27.63 an hour;
- The employee must be employed as a computer systems analyst, computer programmer, software engineer or other similarly skilled worker in the computer field performing the duties described below;
- The employee's primary duty must consist of:
 1. The application of systems analysis techniques and procedures, including consulting with users, to determine hardware, software or system functional specifications;
 2. The design, development, documentation, analysis, creation, testing or modification of computer systems or programs, including prototypes, based on and related to user or system design specifications;
 3. The design, documentation, testing, creation or modification of computer programs related to machine operating systems; or
 4. A combination of the aforementioned duties, the performance of which requires the same level of skills.

Outside Sales Exemption

To qualify for the outside sales employee exemption, all of the following tests must be met:

- The employee's primary duty must be making sales (as defined in the FLSA), or obtaining orders or contracts for services or for the use of facilities for which a consideration will be paid by the client or customer; and
- The employee must be customarily and regularly engaged away from the employer's place or places of business.

Highly Compensated Employees

Highly compensated employees performing office or non-manual work and paid total annual compensation of \$107,432 or more (which must include at least \$684* per week paid on a salary or fee basis) are exempt from the FLSA if they customarily and regularly perform at least one of the duties of an exempt executive, administrative or professional employee identified in the standard tests for exemption.

Blue-Collar Workers

The exemptions provided by FLSA Section 13(a)(1) apply only to “white-collar” employees who meet the salary and duties tests set forth in the Part 541 regulations. The exemptions do not apply to manual laborers or other “blue-collar” workers who perform work involving repetitive operations with their hands, physical skill and energy. FLSA-covered, non-management employees in production, maintenance, construction and similar occupations such as carpenters, electricians, mechanics, plumbers, iron workers, craftsmen, operating engineers, longshoremen, construction workers and laborers are entitled to minimum wage and overtime premium pay under the FLSA, and are not exempt under the Part 541 regulations no matter how highly paid they might be.

Police, Fire Fighters, Paramedics & Other First Responders

The exemptions also do not apply to police officers, detectives, deputy sheriffs, state troopers, highway patrol officers, investigators, inspectors, correctional officers, parole or probation officers, park rangers, fire fighters, paramedics, emergency medical technicians, ambulance personnel, rescue workers, hazardous materials workers and similar employees, regardless of rank or pay level, who perform work such as preventing, controlling or extinguishing fires of any type; rescuing fire, crime or accident victims; preventing or detecting crimes; conducting investigations or inspections for violations of law; performing surveillance; pursuing, restraining and apprehending suspects; detaining or supervising suspected and convicted criminals, including those on probation or parole; interviewing witnesses; interrogating and fingerprinting suspects; preparing investigative reports; or other similar work.

Other Laws & Collective Bargaining Agreements

The FLSA provides minimum standards that may be exceeded, but cannot be waived or reduced. Employers must comply, for example, with any Federal, State or municipal laws, regulations or ordinances establishing a higher minimum wage or lower maximum workweek than those established under the FLSA. Similarly, employers may, on their own initiative or under a collective bargaining agreement, provide a higher wage, shorter workweek, or higher overtime premium than provided under the FLSA. While collective bargaining agreements cannot waive or reduce FLSA protections, nothing in the FLSA or the Part 541 regulation relieves employers from their contractual obligations under such bargaining agreements.

Where to Obtain Additional Information

For additional information, visit our Wage and Hour Division Website:

<http://www.dol.gov/agencies/whd> and/or call our toll-free information and helpline, available 8 a.m. to 5 p.m. in your time zone, 1-866-4USWAGE (1-866-487-9243).

This publication is for general information and is not to be considered in the same light as official statements of position contained in the regulations.




 HR


 Q

Is intermittent or reduced leave permitted under the Family and Medical Leave Act (FMLA)?


 A

Under the FMLA, employees may take leave in several ways—continuous leave is just one type of FMLA leave that employees can take. In certain circumstances, leave can be taken intermittently or on a reduced-leave schedule basis.

- **Intermittent leave** is taken in separate blocks (for example, a week of leave here and there), rather than continuously.
- A **reduced-leave schedule** decreases an employee's usual number of hours per workweek or per workday (for example, a change from full-time status to part-time status).

In general, an employee may take intermittent leave or reduced leave for the birth, adoption or foster care placement of his or her child, only if the employer agrees.

Intermittent or reduced leave can also be used to care for a spouse, child or parent with a serious health condition, for the employee's own serious health condition or for a covered service member with a serious injury or illness if it is medically necessary and the medical need can be best accommodated through an intermittent or reduced-leave schedule.

Intermittent or reduced leave can also be used for any qualifying exigency which arises as a result of an employee's spouse, son, daughter or parent serving on covered active military duty.

If an employee needs leave intermittently or on a reduced schedule for planned medical treatment, the employee must make a reasonable effort to schedule the treatment so that it does not overly disrupt the employer's operations.

Also, if an employee takes intermittent or reduced leave for planned medical treatment or following the birth of a child or the placement of a child for adoption or foster care, an employer may require the employee to transfer temporarily to an available alternative position. The employee must be qualified for the alternative position, the position must provide equivalent pay and benefits (though not equivalent duties) and the position must accommodate recurring periods of leave better than the employee's regular position. An employer cannot

transfer an employee to an alternative position in order to discourage the employee from taking leave or to create a hardship for the employee. For example, an employee working the day shift cannot be reassigned to the graveyard shift.

When an employee takes FMLA leave on an intermittent or reduced-leave schedule basis, the employer must account for the leave using an increment no greater than the shortest period of time that the employer uses to account for use of other forms of leave. However, this period cannot be greater than one hour, and an employee's FMLA leave entitlement may not be reduced by more than the amount of leave actually taken.

Nonetheless, where it is physically impossible for an employee using intermittent leave or working a reduced-leave schedule to commence or end work midway through a shift (such as a flight attendant), the entire period that the employee is forced to be absent is designated as FMLA leave and counts against the employee's FMLA entitlement.

Q&A

Employment Practices



HR

Q

Which employees should be paid overtime, and what are some basic rules to go by?

A

The Fair Labor Standards Act (FLSA) states that nonexempt employees must be paid time and one-half their regular rate of pay for all hours worked over 40 in a seven-day workweek. Nonexempt employees are defined under the FLSA, and appropriate classification of employees is critical. In accordance with the FLSA, overtime pay must be calculated on a weekly basis—and not over a two-week (or longer) pay period.

The FLSA also requires employers to pay all overtime hours an employee actually works, even if that overtime is not authorized. Employers may choose to discipline an employee for working unauthorized overtime, but all overtime hours must be paid.



Q&A

Legal Compliance

Q

What types of employer conduct are prohibited under federal law?

A

Federal law prohibits discrimination in many different forms, including:

- Rejecting job candidates, terminating employees or discriminating against them in any way due to their race, color, religion, sex or national origin; and
- Limiting, segregating or classifying candidates or employees in any way that deprives them of employment opportunities or affects them adversely as employees due to their race, color, religion, sex or national origin.

Here are some examples of conduct that is prohibited under federal civil rights laws:

- National origin discrimination, such as making it mandatory that employees speak only English at work, is prohibited unless it is necessary for business.
- Not providing religious accommodation, such as forbidding an employee from taking breaks at nonstandard times for prayers, is prohibited unless doing so would cause undue hardship for the employer.
- Sexual harassment, such as unwelcome flirtation or requests for sexual favors is prohibited.
- Pregnancy-based discrimination, such as rejecting an obviously pregnant candidate because you anticipate that she may be taking maternity leave shortly, is prohibited.
- Age discrimination, such as specifying age preferences or limitations in job postings, rejecting or terminating a qualified candidate or employee due to the individual's age, or providing fewer benefits to older employees is prohibited. Specifying age preferences or limitations may, in rare instances, be permitted if being a specific age is pertinent to the job being advertised.



Q

What types of accommodations do I have to make for employees with disabilities?

A

A reasonable accommodation is a modification or adjustment to a job or the work environment that enables a qualified applicant or employee with a disability to participate in the application process or to perform essential job functions. Reasonable accommodation also includes adjustments to ensure that a qualified individual with a disability has the same rights and privileges in employment as employees without disabilities. Some types of reasonable accommodation include:

- Alternative working schedules
- Reassignment to a different position
- Provision of interpreters
- Physical accessibility and usability
- Alteration of equipment and/or provision of different equipment
- Restructuring of job duties
- Modified examinations, training sessions or policies

Leave from work beyond FMLA leave entitlement may be considered a reasonable accommodation.

According to the Americans with Disabilities Act (ADA), reasonable accommodations are to be determined by an "interactive process." The interactive process should consist of an open dialogue between the employer and the qualified individual about what types of reasonable accommodation(s) can be made to ensure that the applicant or employee can perform the essential functions of the position. Employers should document the interactive process to demonstrate good faith efforts in providing reasonable accommodation(s) to any qualified individuals, should claims of discrimination arise.

Reasonable accommodations must be provided to candidates and employees, unless the accommodation would cause the employer "undue hardship," as defined under the ADA.

Employers are prohibited from retaliating against a candidate or employee who has requested reasonable accommodations.

**Q**

What are considered appropriate reasons for an employee to take FMLA leave?

A

Employees eligible for FMLA leave must be allowed to take up to 12 weeks of leave during any 12-month period for any one, or more, of the following reasons:

- Birth and care of the employee's son or daughter, up until one year after birth
- Placement of a child under the age of 18 with the employee for adoption or foster care, and care for the child, up until one year after placement
- Care for an immediate family member (spouse, child or parent) with a serious health condition
- Employee's own serious health condition that makes the employee unable to perform one or more essential job functions
- Any qualifying exigency arising out of the covered active duty or impending call or order to covered active duty of a family member (spouse, child or parent) in the Armed Forces

An eligible employee must be allowed to take up to 26 weeks of leave during a single 12-month period to care for a covered servicemember with a serious injury or illness who is the employee's spouse, child, parent or next of kin.

HR

Employee Benefits

Q

What are the regulations regarding employees returning from workers' compensation leave?

A

Since each state administers its own workers' compensation program, there may be variances in coverage and benefits. The federal government also administers its own program for federal employees.

Employers should refer to their state's workers' compensation laws to determine the rights of employees returning after a workplace injury or illness.

If an employee on workers' compensation leave qualifies for the Family and Medical Leave Act (FMLA), he or she is protected under that law. FMLA provides employees with up to 12 weeks of job-protected leave, which may coincide with workers' compensation leave. Under the FMLA, employers cannot force FMLA-qualified employees to return to work in a different position prior to their 12 weeks of leave being exhausted. Upon returning to work, these employees must be returned to their former or equivalent position.

If an employee is offered a light-duty or alternate position, he or she can determine whether to accept the position or to utilize FMLA leave. If FMLA leave has been exhausted and the offered position is declined, workers' compensation benefits may cease. If the offered position is accepted, the employee has the right to be returned to his or her original position or an equivalent position when cleared to return to work without restrictions.

If an employee's workplace injury or illness qualifies as a disability under the Americans with Disabilities Act (ADA), the employer may need to provide the employee with reasonable accommodations in order for the employee to be able to perform the essential functions of his or her former job, unless the employee is willing to transfer to another position that better accommodates the disability. However, the ADA does not require a new position to be created as an accommodation, which would mean that if a new position were the only option, the employer would not have to allow the employee to return to work.

A dark grey, jagged-edged circular badge containing the white text "HR".

Q&A

Legal Compliance

A large, light grey letter "Q" used as a question marker.

What are the requirements for restoring an employee to his or her original position upon return from FMLA leave?

A large, purple letter "A" used as an answer marker.

Upon return from Family and Medical Leave Act (FMLA) leave, an employee must be restored to his or her original position or to an equivalent position with equivalent pay, benefits, and other terms and conditions of employment. An employee is entitled to reinstatement even if he or she was replaced during the leave or if the employee's position was restructured to accommodate his or her absence. However, there are circumstances under which reinstatement is not required.

An employee on FMLA leave has no greater right to reinstatement than an employee who was not on leave. For example, an employer is not required to reinstate an employee if it can be proven that the employee would have been terminated or laid off regardless of being on leave. If an employee is unable to perform an essential job function because of a physical or mental condition, including the continuation of a serious health condition or an injury or illness covered by workers' compensation, the FMLA does not require an employer to restore the employee to another position. However, the employer may have other obligations to that employee under the Americans with Disabilities Act (ADA), state laws or workers' compensation laws.

In addition, an employer is not required to restore an employee who fraudulently obtained FMLA leave. An employer may also delay reinstatement of an employee who fails to provide a required fitness-for-duty certification to return to work.

Furthermore, if specific requirements are met, employers may refuse to reinstate certain highly paid key employees following FMLA leave, where restoration would cause substantial and grievous economic injury to their operations. A key employee is a salaried employee who is among the highest-paid 10 percent of all employees within 75 miles of the work site.



Q

Does the Fair Labor Standards Act (FLSA) affect me as an employer? What effect does it have on state and federal labor laws? What aspects of the FLSA should an employer consider?

A

The FLSA applies to:

- Enterprises that have at least two employees;
- Hospitals, businesses providing medical or nursing care for residents, schools, preschools and government agencies; and
- Enterprises that have a gross annual volume of sales of at least \$500,000, unless the enterprise is not subject to the dollar value test (according to 29 U.S.C. §203(r)(1), §203(s)(1)).

Most employers are considered covered enterprises, but please note that the FLSA may still apply for non-covered employers if their employees work in “interstate commerce.”

Employers must understand the FLSA and create policies and procedures that comply with it. Failing to do so could result in costly litigation. Please note that state laws supercede the FLSA only when they are more favorable to employees.

Some common mistakes employers make regarding the FLSA include:

- Taking incorrect deductions from exempt employees’ salaries;
- Not paying employees for job-related tasks completed before and after their shifts (for example, time spent clocking in should be paid);
- Unfair or inconsistent clock rounding practices;
- Not reviewing and updating the exempt and nonexempt classifications of employees; and
- Misclassifying employees as independent contractors.

Employers are encouraged to follow up by researching the [FLSA](#) as well as any related state laws and how they apply. Failure to do so could result in costly fines.

**HR**

Q&A

Legal Compliance

Q **Am I required to give an at-will employee a reason for his or her termination? Does employment at-will protect me from a wrongful termination claim?**

A The employment at-will doctrine means that the employment relationship can be ended by either party (employer or employee), at any time, for any reason or for no reason at all, and with or without notice. Most private-sector employers subscribe to this doctrine.

Montana is the only state that is exempt. A Montana-based employer is required to have just cause for terminating the employment relationship after an employee has completed his or her probationary period.

The doctrine does not prohibit employers from adopting a practice of informing employees of the reasons for termination. If done appropriately, providing reasons may ease the termination process and reduce the likelihood of wrongful termination claims filed by former employees.

The employment at-will doctrine does not change the fact that federal employment laws prohibit employers from terminating employees on the basis of certain protected classifications and activities. In general, an employer cannot terminate an employee due to race, gender, age, disability, pregnancy, national origin and religion. An employer is also prohibited from terminating an employee in retaliation for the employee exercising his or her federally protected rights.

Subscribing to the employment at-will doctrine does not mean that an employer cannot be accused of wrongful termination. However, an employer can protect itself from wrongful termination claims and increase the likelihood of prevailing in court by maintaining relevant documents and records which support all actions related to employment decisions.

HR Insights

Hire to Fit Your Company Culture

Poor hiring decisions can be extremely costly for your company, in terms of business interruption, wasted recruiting and training resources, lower employee morale and more. You may realize that an individual is not a good fit, or a new employee may choose to leave if the job doesn't match his or her expectations. In both circumstances, many of these separations are due to the fact that the hired individuals did not fit the company culture and therefore lacked productivity, creativity and/or morale.

Culture is the unifying element that holds everyone in an organization together. Unlike an established mission statement, culture encompasses the written and unwritten behavioral norms and expectations of those within the company. Culture can set one company apart from others, and it can include the value of work-life balance issues, the way the company is organized, the extent to which leaders follow through on mission statements and many other factors.

Companies looking to hire individuals that fit with their culture must first identify and understand it. For instance, if your organization recognizes personal achievements and awards individuals for a job well done, then a team-oriented employee might not be the best fit. But if your company values the total team performance versus the contributions of just one individual, then someone looking for personal recognition might not be as satisfied working for your company. Ultimately, if the fit is not right between the company and individual, then both will lose interest and the relationship will probably fail.

Importance of a Good Fit

Finding employees who are a good fit for the organization produces the following benefits:

- Improved employee retention.
- Enhanced employee performance because most individuals at the company share similar values and aspirations. When people share a common purpose and similar attitude, it can encourage people to perform better.
- Improved alignment from the top to the bottom, and employees may view leadership more positively.

Screening to Find a Cultural Fit

Developing a screening process that integrates prescreening based on your company culture can be accomplished with the following steps.

1. Ask employees at various levels of the organization how they see your company culture. Then, identify the similarities that arise among individuals—motivations, values, core competencies, etc.
 - When you can identify what makes the organization successful, you will know what to look for during the selection process. This technique is also helpful in avoiding hiring discrimination

- allegations because you have defined the key characteristics of your culture, which help you logically and fairly justify your hiring decisions.
2. Create a brand to describe your organization to potential employees.
 - Depict your culture accurately so that candidates can filter themselves in or out based on how you describe the company. If they do not see themselves fitting into your culture, they may not even apply.
 - To make branding more real for prospective employees, provide messages from executives, testimonials from various employees, virtual job tours, etc.
 3. Have candidates complete an online assessment as part of the recruitment process to screen potential candidates based on their qualifications, personality and other factors. Use properly validated assessments that meet legal and professional standards.
 4. Ask questions about traits that you cannot or do not want to train someone how to do (being self-motivated, possessing integrity, etc.). Questions should determine if candidates have values and competencies that match with the company's culture.
 - Ask behavior-related questions and then rate open-ended answers on a scale.
 - Ask for examples of situations in which candidates faced dilemmas or problems and successfully overcame them.
 5. Role-play during the interview process to observe candidates in action. Or, allow them to try out the position for a day to see if it seems like a good fit for them (and for you).
 - This step would come after all interviewing is complete, and reference checks and resume verification checks are also done.
 6. Know the laws applicable to hiring.
 7. Create metrics for measuring cultural fit by determining cost-per-hire, time-to-fill and quality-of-hire data.
 8. Make sure management is trained on how to properly interview for behaviors.
 9. Maintain accurate records of all your hiring decisions. During an audit or discrimination

claim, you will need to produce valid justification for your decisions.

10. Human resources should stay on top of monitoring, learning and studying the culture of the organization, and then design policies that align with the culture. HR should constantly be asking if the organization is truly what it claims, if it needs to modify the culture to be more competitive and if it is remaining compliant with all hiring laws.

Don't Become Drained by Culture

Although finding a cultural match is beneficial, sometimes desperately seeking individuals who align with the company culture can backfire. Here's why:

- If the company promotes itself differently than how the culture really is, then prospective employees will be lured in under false pretenses. If employees realize that they've been sold on a company inaccurately, they will probably leave shortly after being hired and will lack the morale needed to succeed while they are still there.
- People who are too similar to one another tend to lack the zest needed to be proactive. If your entire company is full of mediocre performers, no one will stand out to motivate others to work harder. Along these same lines, groupthink may set in.
- Emphasizing a company culture can become a legal exposure with regard to compliance audits and discrimination accusations. If you do not hire someone based on the fact that they "did not fit in with your culture" but have no quantitative proof to back this up, your organization may be held liable for discrimination or failure to comply with equal hiring provisions.