

Implementing Best Practices in Human Resources for a Local United Way Organization

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**Doctor of Education and
Organizational
Leadership Consultancy
Project**

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BACKGROUND

- Local nonprofit organization
- Identify community needs
- Focuses on improving education and financial stability
- Broadening access to health care



PROJECT PURPOSE

- To address identified challenges:
Lack of HR policies, procedures, processes, and training
- Why I chose this project?
To improve my leadership skills and enhance current HR knowledge



PROFESSIONAL LITERATURE REVIEW

- Develop employee records management system (Steingold, 2017, Fleischer 2017)
 - Implement a compliance training programs (Martinelli, 2017)
 - Develop a health and safety program (OSHA, 2020)
 - Provide compliance and reduce risk with written policies and training (Bastida, 2018, Daniel, 2006)
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SCOPE

- Focused on providing guidance as a subject matter expert on human resource best practices
- Developing, integrating, analyzing policies, and procedures
- Training and implementing according to federal and state HR regulations.





APPROACH

- Kick Off Phase (Fall 2018)
 - Build/ Design Policy & Training Phase (Spring/Summer 2019)
 - Implementation Phase(Fall 2019)
 - Survey Phase (Spring 2020)
 - Training Phase (Fall 2020)
 - Closure Phase (Spring/Summer 2021)
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WORK PLAN Activities

Activities	Duration	Start	Finish	Responsible Individual
Presented United Way with the project proposal with timelines and received signatures	1 day	12/17/2018	12/17/2018	HR Manager/Project Mgr. (Student)/CEO
Gather requirements and information for the policies, training and metrics. Create Scope of Work (SOW)	55 days	12/18/2018	3/4/2019	Project Mgr.(Student)
Present Draft Scope of Work (SOW) for review to United Way	26 days	3/5/2019	4/9/2019	HR Manager/Project Mgr.(Student)/CEO
Scope of Work Updates (SOW)	11 days	4/5/2019	4/19/2019	Project Mgr.(Student)
Goal #1 Develop an internal Personnel Records Management Policy and Procedures for the Human Resources Department that will bring United Way in compliance with federal and state law for non-profit organizations and while securing the files and maintaining internal customer satisfaction above 80% for the new changes that will be approved by the Chief Operating office by September 30, 2019.	116 days	4/22/2019	9/30/2019	HR Manager/Project Mgr.(Student)
Goal #2 Create a Mandatory Compliance Training policy and design and deploy a mandatory compliance training program for all 43 current United Way employees and future new hires to be trained and to fully comply with federal and state laws that will be approved by the Chief Operating office by March 31, 2020.	129 days	10/3/2019	3/31/2020	HR Manager/Project Mgr.(Student)
Goal #3 Implement workplace safety guidelines for United Way employees to reduce injuries by 25% by the end of March 31, 2021.	219 days	5/31/2020	3/31/2021	HR Manager/Project Mgr.(Student)
Monitor, track and follow up on the progress of all new policies and training. Run risk assessments and impact of possible audit and assumptions. Perform surveys to the employee population.	59 days	1/1/2021	2/28/2021	HR Manager/Project Mgr.(Student)
I will have this project completed Goal #3	1 day	3/31/2021	3/31/2021	HR Manager/Project Mgr.(Student)
Draft Documentation and Recommendations	1	04/01/2021	04/17/2021	Project Mgr.(Student)
Documentation and Recommendation Handoff of entire project	1	04/30/2021	6/30/2021	Project Mgr.(Student)



RISK/ CONSTRAINTS

Risk

- Staying on schedule
- HIPAA violation

Constraints

- 2020 Pandemic
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Plan

- Evaluate

Do

- Launch checklist

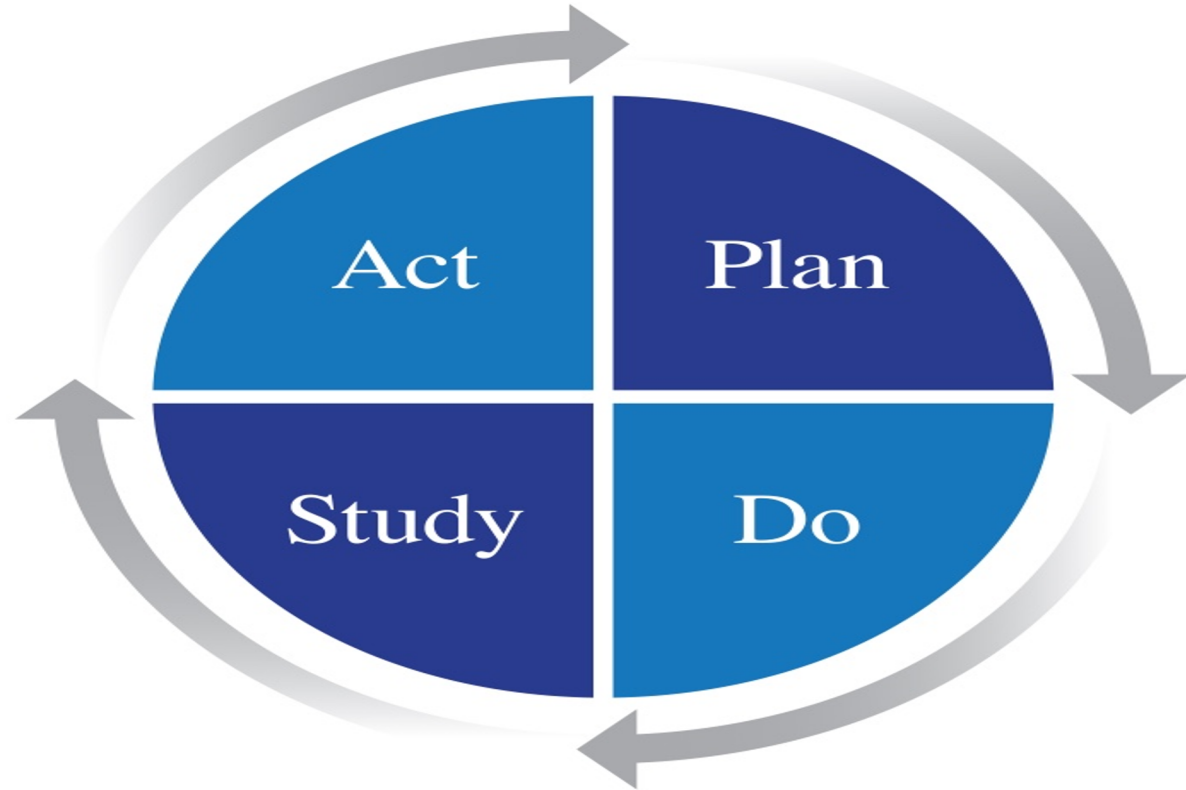
Study

- Observe and evaluate

Act

- Change

QUALITY ASSURANCE PLAN





OUTCOME DATA

- New Employee Personnel File System
 - All employees OSHA trained
 - Added value to the HR Department
 - Positive feedback
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REFLECTION

Learned:

- Leadership growth
- Personal Growth (Strengths and career growth)
- Teamwork

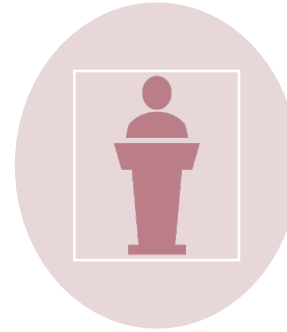
Change:

- Involve more leadership
- Survey earlier
- Commit appropriately

FUTURE



Employee morale and
engagement and
customer service
surveys



Leadership training &
Partner with local
colleges



Electronic Files



Update vision and
mission for the HR
Department

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