



Lunch & Learn:

Networking Mixer For Non-Profits

Welcome:



Kelly Maroney
Ulster Insurance Services, Inc.
Business Development and Sales



agenda:

- 12:00 pm: **Check In and Networking / Grab Some Lunch!**
- 12:30 pm: **Introductory Remarks**
Kelly Maroney, Bus. Development & Sales, Ulster Insurance Services
- 12:40 pm: **USB Video Introduction**
John Finch, Executive VP, Chief Operations Officer, Ulster Savings Bank
- 12:50 pm: **Back to Basics with Insurance**
Stephen Prosser, Assistant Vice President, Ulster Insurance Services
- 01:00 pm: **HR for Non-Profits**
Jennifer Barry, J.D., Sr. HR Consultant/ Asst. HR Practice Leader, GTM

USB video:



John Finch
Ulster Savings Bank
Executive Vice President
Chief Operations Officer

Insurance: Back to Basics



Stephen Prosser
Ulster Insurance Services, Inc.
Assistant Vice President

Types:



Property Insurance

Policies that protect property owners and renters from fire, damage and theft.



General Liability

Can help cover claims for bodily injury or property damage caused by your business.



Commercial Automobile

Protects against common losses such as property damage, theft, and injury.



Umbrella Policy

Provides extra liability coverage on top of your existing underlying policies.

Types:



Workers Comp

Provides income and/ or medical care for workers who are hurt or made ill as a direct result of their job.



Builders Risk

Helps protect projects from certain types of property damage during construction.



Disability

Helps to protect your income if you become disabled and unable to work.



Directors & Officers

Covers directors and officers of a company against lawsuits alleging a breach of fiduciary duty.

Types:



Employment Practices Liability

Helps protect against employment-related claims, like wrongful termination, discrimination, and harassment.



Professional Liability

Covers claims arising from errors, mistakes, or negligence in the delivery of professional services.



Cyber Liability

Helps protect businesses from financial losses resulting from incidents like data breaches, viruses, hacking, and ransomware

HR for Non-Profits:



Jennifer Barry, J.D.
GTM
Sr. HR Consultant /
Assistant HR Practice Leader

GTM: Today's Objectives

- Learn why HR is so important in non-profit organizations
- Discuss the connection of HR with mission
- Identify the top HR challenges for non-profit organizations
- Determine how HR creates culture in support of employee engagement
- Understanding the value of an HR strategic plan



The Importance of HR

- HR is the glue that keeps the organization running
- HR is in charge of hiring, firing, training and the wellbeing of employees and volunteers
- HR helps align the organization with the mission
- HR helps ensure the those on the ground can focus on what truly matters to them
- HR connects people to the strategy



Common HR Challenges Faced by Non-Profits

- Limited or inconsistent funding
- Difficulty recruiting and retaining talent / turnover
- Compliance with federal and state law
- Talent burnout, lack of professional development and performance management
- Managing a diverse workforce



Limited Funding

- Funding affects all aspects of HR:
 - Is inconsistent and may change year-to year
 - Creates difficulty in attracting and retaining talent, especially at the Executive Director level
 - Generally, requires lower pay overall
 - Often limits benefits can offer
 - Often leads to the need to utilize volunteers



Overcoming the Challenges of Limited Funding

- Creative compensation
- Grant funding
- Volunteers
- Utilizing workforce in different ways



Compensation

- What you **should not** do:
 - Pay men and women differently for the same work
 - Ask candidates about salary history
- What you **should** do:
 - Evaluate jobs for levels of skill, effort, and experience
 - Determine if employees can be assisted by volunteers
 - Determine when to cross-utilize talent
 - Set wages to job roles for hiring



Compensation: FLSA and State Labor Standards

- What you **should** do:
 - Determine if the FLSA applies to your organization
 - Understand the terms Exempt and Non-Exempt
 - Collect all time worked; adhere to meal break law
 - Track volunteer time separately; do not “pay” volunteers for work they do
 - Make sure you are paying at the correct frequency - weekly pay requirement for “manual workers”
 - Understand Independent Contractor rules



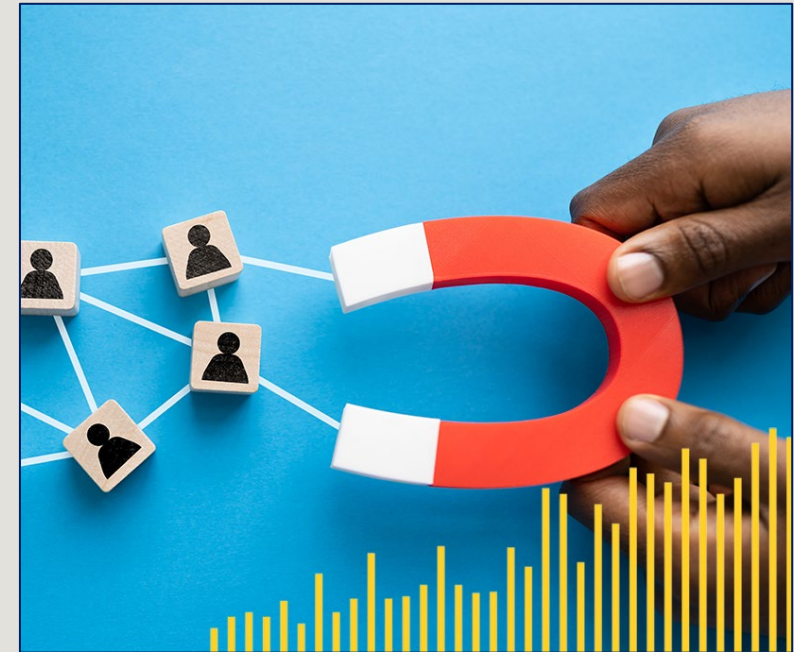
Classifying Workers: Employee vs. Volunteer

- Be careful to classify non-employees correctly
- Volunteers cannot receive compensation
- Do not provide any in-kind benefits
- Misclassification can lead to back-pay, back taxes and penalties
- Organization not required to carry WC insurance in NY



Recruiting and Retention

- Lower pay does not help in attracting talent
- Fewer increases and lack of development makes it hard to retain talent
- Especially difficult to hire ED and Executive talent



Recruiting and Retention Solutions

- **Solutions commonly used by non-profit organizations to attract and retain talent:**
 - **Mission-Driven Recruitment:** Highlight the organization's mission and the difference employees can make. Many people are motivated by purpose, not just money.
 - **Non-Compensation benefits - communicate "Total Compensation" annually**
 - **Career Development:** Offer opportunities for growth and development. Employees are more likely to stay if they see opportunities for growth.
 - **Positive Workplace Culture:** Create a supportive and engaging work environment. A positive culture can improve job satisfaction and retention.



Compliance

- What you **should** do:
 - Update your handbook (share with EEs & Volunteers):
 - Fair treatment policies for recent law compliance- sexual harassment, transgender, ADA, religious accommodation
 - Provide annual and new hire sexual harassment training - EEs and Volunteers
 - Pay Transparency law - Pay Equity
 - Leave Management
 - Technology policies - ability to monitor
 - Federal and State Poster Requirements
 - Develop systems and procedures to follow policies created
 - Have go-to resources to keep updated!!



Compliance - Keeping Up With Leaves

- What you **should** do:
 - Administration of NYS Paid Family Leave, Disability, Workers' Comp and FMLA - which apply (Size of ER; EEs/Volunteers)?
 - PTO or separate pools - align internal policies
 - Watch for mandated sick leave (including COVID)
 - Mandated leaves:
 - Victim and Witness Leave
 - Emergency responder
 - Military Leave and Military Spouse Leave
 - Blood donation
 - Bone marrow
 - Voting leave



Talent Management

- Reduce employee burnout
 - Work-life balance
 - Offer EAP - Wellness
 - Recognition and rewards
- Offer Professional Development
 - Budget-friendly internal training
 - Online courses/webinars
 - Networking opportunities
- Performance Management
 - Set goals to meet organizational needs
 - Provide upward mobility or options for success



Employee Engagement a Priority

- What you **should** do:
 - Train managers!
 - Create an environment in which employees can share ideas and problems
 - Do not limit discussion to annual evaluations and/or discipline
 - Examine processes and workflows
 - Embrace family/work needs
 - Recognize talent - provide positive feedback
 - Use engagement or culture surveys for direction



Managing a Diverse Workforce

- What you **should** know:
 - Often serving diverse communities and need workforce that reflects that diversity
 - Inclusive recruitment
 - Diversity and Inclusion Training
 - Develop inclusive policies
 - Two largest population groups together for the first time (up to 5 generations now working together) - different motivators, learning styles, work styles
 - New workspaces - remote



Key Points to Remember!

- HR is critical in managing non-profit organizations.
- HR is in charge of hiring, firing, training, and the well-being of employees and volunteers.
- HR helps align the organization with the mission.
- HR connects people to the strategy.