

Human Resources Basics for EAS Centers
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1. Introduction

- a. Effective HR practices are important:
 - A. Talent Management
 - B. Operating within legal realms
- b. Many EAS centers don't have the resources to hire an HR specialist so the E.D. or another employee must wear that hat.

2. Classifications of Employees/staff - Most common

- a. Salaried Exempt
- b. Salaried Non-Exempt
- c. Hourly
- d. Independent contract- not an employee

3. Exempt vs. Non-exempt

- a. Exempt Employees
 - A. Not entitled to overtime pay
 - B. Salaried, not hourly (usually)
 - C. Set salary even if employee works a longer than 40-hour work week
 - D. **Must** earn a minimum salary of at least **\$35,568 per year** (\$684 per week).
 - E. High level responsibilities. Uses discretion and independent judgment
 - F. Full day deduction can be made, but partial deductions not allowed.
 - G. Exempt employees spend more than 50 percent of their time performing exempt work.
 - H. Have the power to hire and fire their direct reports
- b. Examples of Exempt Employees - Usually classified as Salaried Exempt
 - A. **Executive:** Executive Directors, CEO,
 - B. **Administrative:** Chief Operation Officers, Chief Financial Officers, Facility Managers, Equine Managers, Volunteer Coordinators Directors of Development, Business Mgrs.
 - C. **Professional:** Certified Instructors, Therapists, Counselors

Note: Job titles **DO NOT** make an employee exempt.

c. Non-Exempt Employees

- A. Must be paid minimum wage plus overtime pay if work more than 40 hours in a workweek.
- B. Overtime must be paid at 1.5 times regular pay rate.
- C. Don't usually have direct reports or make high level decisions independently.
- D. Can't ask to "volunteer" in job-related areas.
- E. Non-exempt have more protection under federal law

d. Examples of Non-Exempt employees-classified as salaried non-exempt, or hourly

- A. Receptionists
- B. Stable Hands
- C. Lesson Assistants
- D. Assistants to Directors or Managers
- E. Bookkeepers

Note: Employees who are employed in agriculture as that term is defined in the ACT are exempt from the overtime pay provisions.

4. Independent Contract Staff - Not Employees

Contract workers also known as an independent contractor 1099 employees are individuals who enters into a contractual agreement with a business in order to provide a service in exchange for a fee. Fee can be hourly or by the project

- a. Independent contractors have a 1099 tax form filed- do not use a W-2
- b. Contract staff members set their own schedule
- c. Contract staff members may bring their own “tools of the trade”
- d. Contract staff members file their own taxes
- e. Provide their own liability insurance

f. Examples of Independent Contract staff members:

- A. Physical Therapists
- B. Occupational Therapists
- C. Speech and language pathologists
- D. Mental Health counselors
- E. CPA's

5. Hiring *Hire smart, train well, manage easy*

a. Tips for Hiring

- A. Clear, thorough job description
- B. Job announcement - Consider the audience
- C. Interview process- plan ahead
- D. 2 or more on the search committee for manager level folks
- E. Mingle with the team at some point?
- F. Early in process determine salary requirements
- G. DO NOT SETTLE!!!
- H. Sometimes the best fit is in-house.
- I. Culture fit?
- J. Social Media Checks

b. Negotiation

- A. Salary
- B. Benefits
- C. PTO
- D. Health Insurance
- E. Horse Board
- F. Dependent riding lessons

c. Make sure offers are in writing and pending:

- A. Reference Checks

- B. Background checks
- C. Drug testing
- d. Benefits: Examples
 - A. Health Insurance
 - B. Dental
 - C. Vision
 - D. PTO (vacation and sick leave)
 - E. Maternity/Paternity leave
 - F. Bereavement leave
 - G. Paid Holidays
 - H. 401-k with employer contribution
 - I. Paid Continuing Education
 - J. Horse Board
 - K. Riding lessons
 - L. Logo wear
 - M. Workers Compensation
- e. Sample of Paid Holidays
 - A. New Year's Eve Day
 - B. New Year's Day
 - C. Martin Luther King, Jr. Day
 - D. Presidents Day
 - E. Good Friday-
 - F. Memorial Day
 - G. Juneteenth Day
 - H. Independent Day (July 4th)
 - I. Labor Day
 - J. Thanksgiving Day
 - K. Friday after Thanksgiving
 - L. Christmas Eve
 - M. Christmas Day

6. On Boarding

- a. New Employee First Day
 - A. Have desk set up with flowers or crepe paper streamers, etc.
 - B. Nametags ready
 - C. Copy of Staff Roster with them added
 - D. HR rep and/or manager check on new employee twice a day for a week.
 - E. 20-minute appts each with other full-time employees
 - F. Logowear
- b. Employee Files
 - A. Comprehensive Employee File- Electronic or Hardcopy or both
 - B. Individuals' information
 - C. Policy and Procedures completed verification forms
 - D. Core Values and associated benchmarks verification forms
 - E. Certification/Licensing copies

- F. PATH Intl Standards completed forms
 - G. Direct Deposit banking information
 - H. Medical and emergency information accessible in case of emergency
- c. Comprehensive Employee Manual
- A. Introduction
 - B. General Employment Information
 - C. Status and Record Keeping
 - D. Working conditions and hours
 - E. Benefits
 - F. Employee Conduct
 - G. Timekeeping & Payroll

NOTE: Clearly outline the expected behaviors and the unacceptable behaviors in the employee handbook. That will be helpful when needing to address issues.

- d. New Employee Orientation
 - e. Components of New Employee Orientation
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| <ul style="list-style-type: none"> A. Ice Breaker B. History of Industry C. History of Organization D. Mission Vision and DEI statements E. Who we Serve F. The Need G. How and Why it works H. Fact Sheet I. Programs | <ul style="list-style-type: none"> J. Horses K. Core Values & Benchmarks L. Emergency Procedures M. Policy and Procedures N. HR O. Org Chart P. Budget Q. Departments Q & A |
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7. Workplace Culture

- a. How to Create a Strong Workplace
 - A. ***Steve Jobs: "Great things in business are never done by one person. They're done by a team"***
- b. Core Values
 - A. **Core values** are the core beliefs of an organization. guide you when making decisions, building relationships, and solving problems. Help an organization determine how to allocate resources, make important decisions, and grow. Create a healthy work environment that is conducive to attaining a common goal.
 - B. Usually, 5-10 core values Equest's are POISE: Professionalism, Optimism, Integrity, Excellence and Stewardship.

C. PATH International's Core Values:

Access and Inclusion: Promoting diversity and opportunity in equine-assisted services

Compassion and Caring: Providing a culture of safety, understanding and ethical treatment of both the humans and the horses

Cooperation and Collaboration: Connecting and partnering with those who share the PATH Intl. vision in a mutually beneficial manner

Education: Sharing valued knowledge with our constituents to facilitate their success

Excellence: Promoting quality in all undertakings

Innovation: Encouraging and supporting creativity, inquiry and cutting-edge research

Integrity and accountability: Ensuring that all business is based on ethical principles and conducted with transparency

Professionalism: Enhancing the value and credibility of the industry

Service: Enhancing the value and credibility of the industry

Holism: Promoting an awareness of body, mind and spirit in equine-assisted services

8. Board/Staff Relationships

a. The Lines Between Board and Staff

A. Board

Recruits, hires and evaluates ED/CEO

Approves mission, goals, Objectives

Recruits board members

Approves all new program proposals

Approves fundraising goals; participates in efforts

Enforces Bylaws

Makes high level policy (finance, legal, governance, etc.)

Ensures good management

Enhance Public Standing

B. Staff

Hires and evaluates all other staff

Works w/ board to review mission, develop new programs

Offers input on board candidates; helps with training

Implements approved programs

Provides input to fundraising plans & Implements fundraising efforts

Provides information and implements policy

Keeps the board informed

The Face of the organization

9. Annual Performance Reviews-

A. Pre-Review:

Employee questionnaire - solicit input

Examples:

Expectations and Roles:

Do you know what is expected of you in your current role?

Do you have a clear understanding of your team's core objectives for this year?

Facilitation:

Do you have the materials and equipment you need to do your work to a high level?

Do you feel you receive the leadership necessary to do your work at the level expected?

Right Seat on the Bus

In this role and with this team, do you have an opportunity to do what you do best every day?

What is it you do best?

Recognition and Support

Do you feel that team members are adequately recognized for their achievements?
How do you like to be shown that you are valued, or shown recognition?

Encouragement and Development

What are your career goals?

Is there a leadership member who is encouraging you in your development?

B. Actual performance reviews:

Employee fills out score form, supervisor fills out score forms and then compare.

Sample areas of focus:

Contributes to a Healthy Team Culture

Embraces Solid Job Performance

Provides Effective Leadership - (Management level only)

Core Value Behavior Competencies

Every employee gets a development plan when completed.

To address Low score OR professional development

10. Disciplinary Actions

a. Avoid procrastination on addressing issue.

b. Keep a written log of all disciplinary action taken against an employee, even if the action is only verbal in nature.

c. Face to Face meeting:

A. DO

Stick to the facts

Communicate that your hope is the employee will be successful

Offer corrective action suggestions

Include a second person admin personespecially for 2nd meetings.

ABSOLUTELY document in writing

B. **AVOID:**

Words like crazy, lazy, bad attitude - You don't know what is in their head and their heart

Opinions

Exaggerations, dramatics, or getting emotional

11. Resources

Texas Workforce Commission: <https://www.twc.texas.gov>

www.Oklahoma.gov

<https://oklahomaworks.gov>

www.labor.arkansas.gov

AR division of Workforce Services: <https://dws.arkansas.gov>

U.S. Department of Labor: <https://www.dol.gov>

Louisiana Workforce Commission: laworks.net

Thank you!!