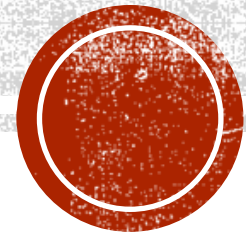




HR TRENDS STRUCTURE & STRATEGY

Virginia Whitham, SPHR, SHRM-SCP, SCMS
Chief HR Officer, Rally Credit Union





**Management Of
Human Assets**

**Liability – Expense &
Risk**

**Greatest Competitive
Advantage**

AGENDA

- HR Evolution and Current Trends
- HR Structure
- HR Strategy
- ChatGPT
- When HR



HR EVOLUTION



Evolution of HR

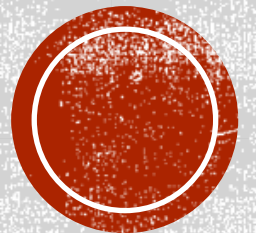


Generation Segments

Personal/Lifestyle Characteristics	Traditionalists	Baby Boomers	Gen X	Millennials	Gen Z
Core Values	Respect for authority Conformers Discipline	Optimism	Skepticism Fun Informality	Realism Extreme fun Informality	Confident Independent Equal to elders
Family	Traditional Nuclear	Disintegrating	Latch-Key generation	Merged Families	Non-traditional families
Education	A dream	A birthright	Means to an end	Huge expense Job not guaranteed	Huge Debt College Degree or Trade
Communication	Rotary Phones One-on-One Memo	Touch-Tone Phones "Call me anytime"	Cell Phones "Call me only at work"	Smart Phones Internet E-mail/Text	Use Phone for Everything Social Media Voice mail
Money Management	Save Pay cash	Buy on credit	Cautious Conservative Savers	Earn to spend	Want meaningful work, income secondary

Source: *Mixing and Managing Generations of Employees*. Greg Hammill, 2005

RE-EXAMINING THE ROLE OF WORK IN OUR LIVES — THE GREAT RESIGNATION



Survey-based study of 3,000 workers found that younger workers had:

- Less sense of moral importance of work
- Less pride in craftsmanship
- Stronger interest in money
- Stronger interest in friends over money

The survey was published in 1979

A review of relationships between age and attitudes found that younger workers:

- Were less involved with their jobs
- Had less organizational commitment
- Were less interested in security
- Had greater needs for self-actualization and growth

The review was published in 1983



2023 GARTNER HR LEADER TRENDS

60% Leader & Manager Effectiveness

53% Organizational Design & Change Management

47% Employee Experience

46% Recruiting

42% Future of Work



78% Maintaining employee morale and engagement

77% Retaining top talent

64% Finding and recruiting talent with the necessary skills

61% Finding ways to reduce costs and improve efficiency

60% Developing more effective leaders and people managers

55% Performing fair and competitive compensation

51% Improving organizational communication

2023 FORBES HR TRENDS

Talent Shortages and Upskilling

Employee Experience

Organizational Agility

Purpose-Driven Work and Workplace

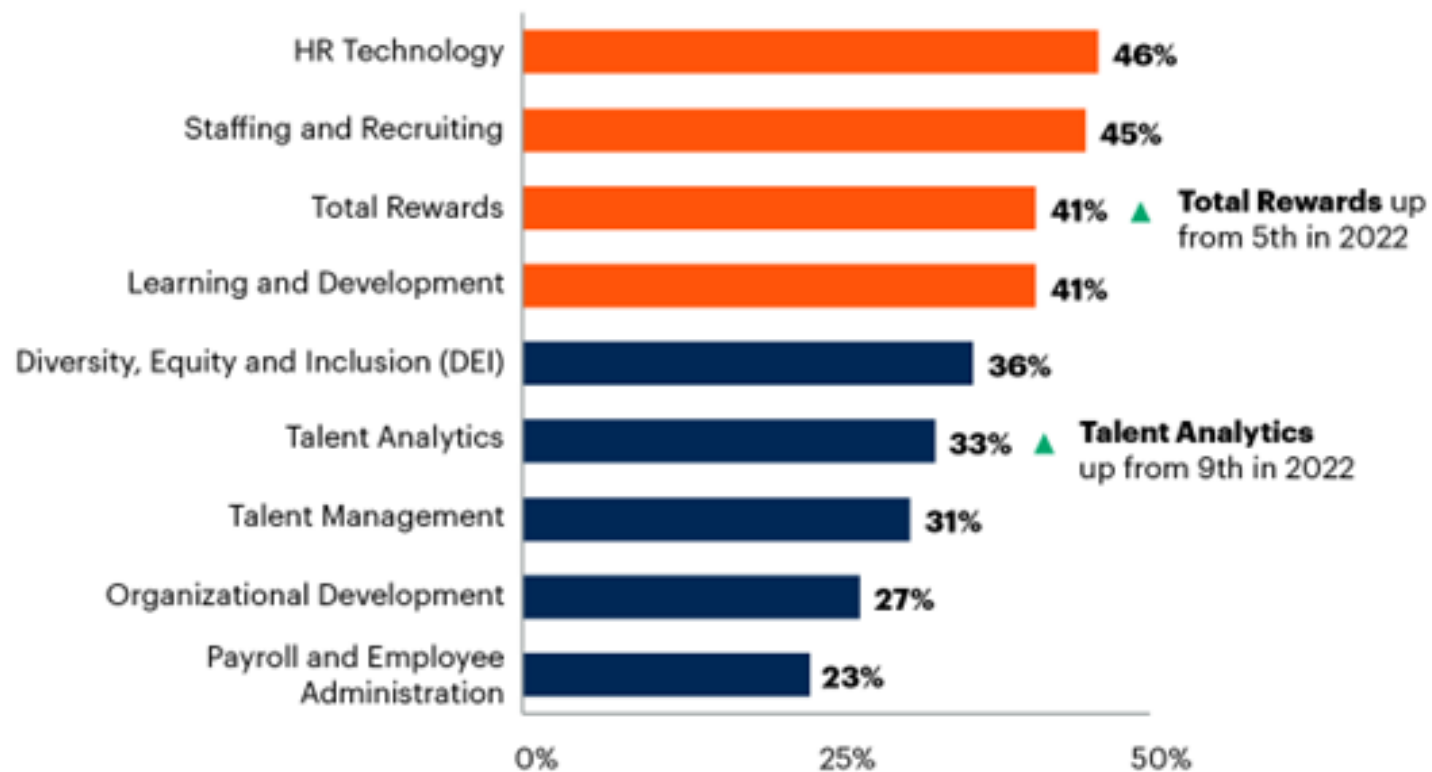
Addressing Workplace Burnout and Mental Health Challenges

HR Digitalization



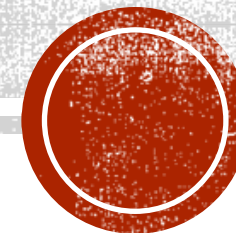
HR Investment Areas

Percentage of HR Leaders Planning to Increase Budget



n = 118 HR Leaders

GARTNER'S TRENDING INVESTMENT AREAS FOR 2023



<https://www.gartner.com/en/newsroom/press-releases/03-06-2023-gartner-identifies-top-four-hr-investment-trends-for-2023>

ALL EMPLOYERS - 1 FTE

- American Taxpayer Relief Act of 2012
- Consumer Credit Protection Act of 1968
- Employee Polygraph Protection Act of 1988
- Employee Retirement Income Security Act (ERISA) of 1974
- Equal Pay Act of 1963
- Fair and Accurate Credit Transactions Act (FACT) of 2003
- Fair Credit Reporting Act of 1969
- Fair Labor Standards Act of 1938
- Federal Insurance Contributions Act (FICA) of 1935 (Social Security)
- Health Insurance Portability and Accountability Act (HIPAA) of 1996 (if company offers benefits)
- Immigration Reform and Control Act of 1986
- Immigration and Nationality Act (INA)
- Lilly Ledbetter Fair Pay Act of 2007
- Mental Health and Addiction Equity Act of 2008 (for group health insurance plans)
- National Labor Relations Act of 1947
- Newborns and Mothers' Health Protection Act of 1996 (for group health insurance plans)
- Occupational Safety and Health Act (OSHA) of 1970
- OSHA Hazard Communication Standard
- Sarbanes-Oxley Act of 2002
- Uniformed Services Employment and Reemployment Rights Act of 1994

FTE 11 to 100+

11 Employees add:

- OSHA Record Keeping

15 Employees add:

- Americans with Disabilities Act 1990 (15 or more)
- GINA 2008
- Pregnancy Discrimination Act
- Title VII – Civil Rights Act 1966

20 Employees add:

- Age Discrimination in Employment Act 1964
- COBRA 1986

At 50 Employees add:

- EEO1 Reporting
- Family Medical Leave
- PPACA
- Affirmative Action Plans
- VEVRAA

At 100 or more and:

- WARN Act 1988 (reduction in force notices)

<https://www.shrm.org>, <https://www.shrm.org/ResourcesAndTools/legal-and-compliance/employment-law/Documents/Federal%20Labor%20Laws%20by%20Number%20of%20Employees.pdf>



HR STRUCTURE: ROLES OF HR

Payroll

Managing compensation packages, direct benefits, timecards, and all payroll related tasks

Benefits/ Leave Administration

Benefits enrollment, leave of absences, FMLA/ADA, retirement plans, and insurance

Skills Based Training

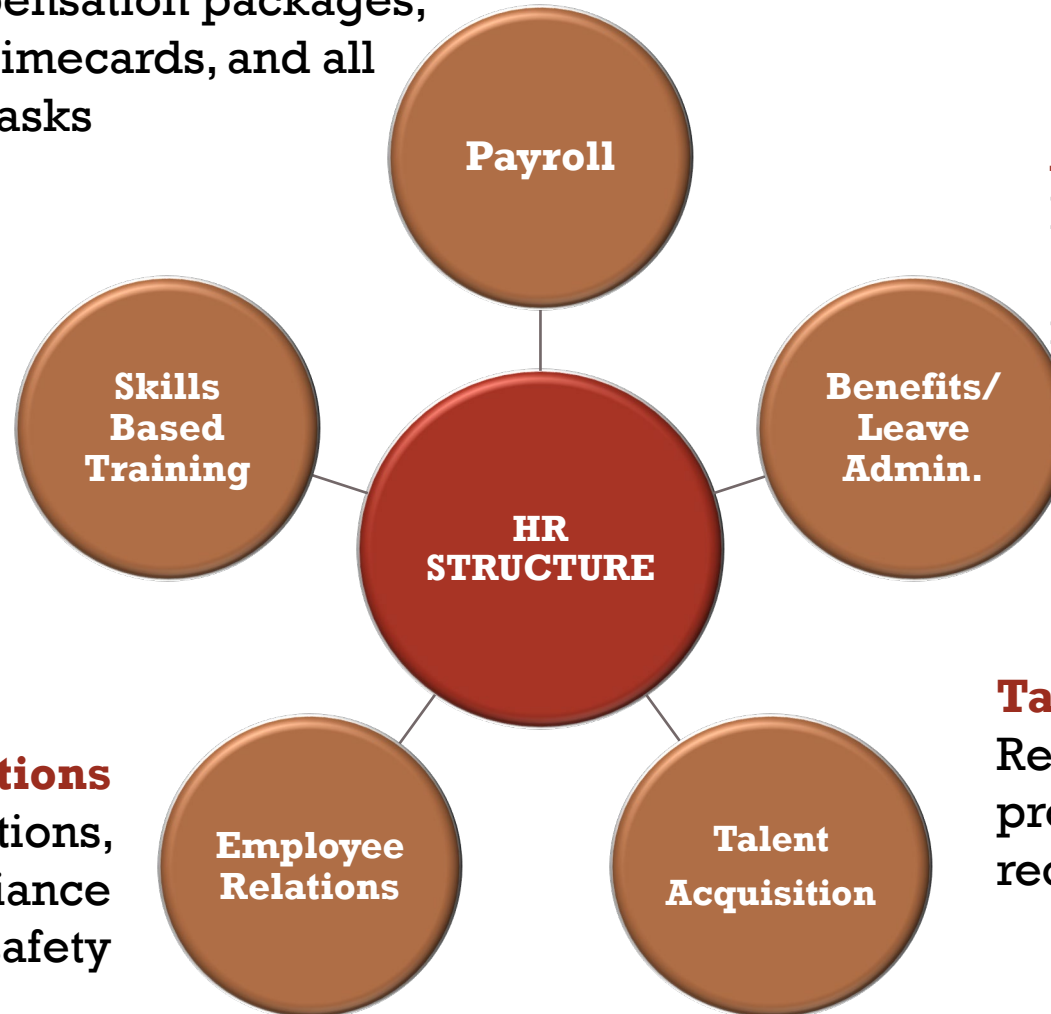
Training to develop required skills to perform jobs and duties

Employee Relations

Employee investigations, terminations, legal compliance with employment law, and safety

Talent Acquisition

Recruiting, onboarding, promotions, and employee recordkeeping



HR STRATEGY: ROLES OF HR

Professional Development Training

Training to expand specific skills for professional advancement, job education, and career development

Organizational Development

Strategic development and planning to align HR goals and processes with those of the organization as a whole

Employee Engagement

Activities, programs, and social events to enhance employee experience, morale, and promote organizational values



WHAT IS HR STRATEGY?

THE STRATEGIC PLANNING PROCESS BEGINS WITH FOUR CRITICAL QUESTIONS:

1. Where are we now? (Assess the current situation.)
 2. Where do we want to be? (Envision and articulate a desired future.)
 3. How do we get there? (Formulate and implement a strategy and strategic objectives.)
 4. How will we know if we are on track toward our intended destination? (Establish a system to evaluate progress.)
-

“Strategic human resource management involves a **future-oriented** process of developing and implementing **HR programs** that address and solve business problems and **directly contribute to major long-term business objectives.**” - SHRM

Data provided by SHRM

HR EVOLUTION



Evolution of HR



UPCOMING TECHNOLOGY: CHATGPT



Scan the QR code to download the app!

“ChatGPT is an AI chatbot built from large language models (LLMs). These models are a type of artificial intelligence (AI) system that's been trained on large amounts of text data. They can understand natural language and produce human-like responses to inputs”- SHRM

"It will change the way people work, learn, travel, get health care, and communicate with each other. Entire industries will reorient around it. Businesses will distinguish themselves by how well they use it." – Bill Gates



CHATGPT – TELLER

Job Title: Teller

Location: [City, State]

Job Type: Full-time

Job Summary:

As a Teller at [Credit Union Name], you will be a key member of our member services team, responsible for providing exceptional service to our credit union members. Your primary role will be to accurately and efficiently process member transactions, handle cash, and assist members with their financial needs. Your dedication to accuracy, attention to detail, and commitment to providing a positive member experience will be essential in this role.

Key Responsibilities:

- Greet and assist members with professionalism and a friendly demeanor, creating a welcoming environment in the branch.
- Process a variety of financial transactions, including deposits, withdrawals, loan payments, and account transfers, ensuring accuracy and compliance with credit union policies and procedures.
- Count and verify cash, checks, and other financial instruments accurately, balancing cash drawer at the beginning and end of each shift.
- Provide information about credit union products and services, answer member inquiries, and identify opportunities to cross-sell additional products, such as savings accounts, certificates of deposit, and loans.
- Assist members in opening new accounts and updating their account information as needed.
- Adhere to security protocols to protect member and credit union assets, including verifying member identification and following security procedures.
- Collaborate with team members to ensure a smooth branch operation and assist in meeting branch goals.
- Maintain knowledge of credit union policies, compliance regulations, and industry trends.
- Handle member complaints or issues professionally and escalate complex matters to appropriate personnel.

Qualifications:

- High school diploma or equivalent; college coursework in finance or related field is a plus.
- Previous teller or cash handling experience preferred.
- Excellent customer service skills with a strong focus on member satisfaction.
- Detail-oriented with strong numerical and organizational skills.
- Ability to work accurately and efficiently in a fast-paced environment.
- Knowledge of banking products and services is a plus.
- Familiarity with credit union principles and values is desirable.
- Proficiency in computer applications, including Microsoft Office.



**Beware – This
doesn't
replace review
and legal
compliance.**



WHEN HR

"Having an HR Manager will probably be a necessity when the company approaches 100 or more employees, but the telltale sign is when the business starts to specialize into functions such as IT, sales and operations," Coffey said. ***"If you need a dedicated manager in those areas, you probably need the specialized knowledge of a human resources manager as well."***

Doug Coffey, HR expert and teaching instructor at the [Rutgers School of Management and Labor Relations](#).

If you've decided that you're ready to take the plunge, ***take your time to recruit an HR professional who jives well with your company culture. Go slow and be picky as you choose an HR Manager.*** In the long run, fast hires often end up being bad for everyone involved. **Choose a team player who will keep your vision front and center but not be afraid to challenge the status quo.** Then, get ready to spend those reclaimed hours on other high-value endeavors.

Mark [McKee](#) President & COO at OnPay, Inc.



BUSINESS.COM 2023: SIGNS YOUR COMPANY NEEDS TO HIRE AN HR MANAGER

- Your time is needed elsewhere.
- You're struggling to maintain legal compliance (50 employees means FMLA)
- You need help with staffing, onboarding and developing your team
- You're growing – with no plans to stop
- You want to keep employee compensation competitive
- Your top priority is company culture



RESOURCES

- **Forbes/ Gartner**
- **Employment Attorney**
- **SHRM/HRCI**
- **CUES**
- **Cornerstone League**
- **XpertHR/Gartner**





THANK YOU

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