



## Workforce Campaign Nonprofit Webinar

In the current labor-deprived market, organizations are looking for creative solutions to address their workforce challenges. Nonprofits in particular are struggling to find the right talent, manage special projects, and streamline processes. Join our **on-demand** webinar for a discussion on workforce disruption and what options you may have to address your organization's particular difficulties.

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Here is a transcription of this session:

Heidi Grinde:

All right. I want to welcome everybody here today as we talk about creative solutions to workforce challenges. I'm Heidi Grinde. I've been with CLA for 15 years, a principal on the nonprofit outsourced accounting side, and I oversee tons and tons of challenges amongst our clients, as it relates to retaining and making sure that the workforce that they have internally is exactly what they need for their organization. Along with me is Jessica, if you want to give a little intro.

Jessica Smith:

Hi everybody. My name is Jessica Smith. I'm an HR consultant based out of New York City.

Heidi Grinde:

And then Michael.

Michael Pelletier:

Great. And I'm Michael Pelletier. I've been with CLA for about 16 years now, managing principal out of our Connecticut office for our digital practice.

Heidi Grinde:

Awesome. So learning objectives for today, we are going to outline best practices for attracting and retaining talent in a very competitive market, as we are all seeing there's a lot of movement and a lot of competitiveness amongst employers in retaining top talent. The next objective will be to identify ways technology can really help us to create a hybrid workforce. And then also recognize opportunities for alternative staffing support to help reduce stress on our teams and really make our staffing model work for our organizations.

Heidi Grinde:

First piece here is just high level overall accounting trends, which I found was really interesting. This was actually a survey done by the AICPA in 2021. And just want to walk through, I guess, this timeline with you guys. So highest level in 2008, there was a highest level of accountants that were enrolled in colleges. This actually was triggered by the crash and people realized and or looked at to see where were the areas where there was extreme unemployment and in the accounting space, that has been



typically one area where there's always been very low unemployment rates. And so that skyrocketed people entering the accounting field. Fast forward to 2015, enrollment starts to flatline and people really are stopping getting their CPA exams. And then also record setting accounting retirements start to begin. So it starts to be kind of this perfect storm where we end up here in 2019, 31% of new accounting hires were actually non accounting majors.

Heidi Grinde:

So technology focused hires was really starting to pick up. And then in 2021, we're even seeing an increase in those technology hires even more so and or people without any accounting background starting to enter the accounting space and really start to build out that workforce with other skill sets that are becoming more and more valuable as it relates to technology and filling gaps within the organization's workforce structure. If we look at 2022 right now, I think this was maybe a couple weeks ago, that income or the unemployment rate for accountants in the overall finance area was 3.2%. So it's one of the lowest unemployment rates in the country. And that also starting to greatly impact the ability to retain and keep that workforce in place.

Heidi Grinde:

If we look at current accounting trends, just high level quick look at this is, people are really wanting hybrid and or remote work. They have this with the pandemic, they know it is possible, and they do not want to come back to the office on a full-time basis. So when we're thinking about our workforce and the people that we bring into our organizations, what can we start to make work in a hybrid fashion and be able to give our employees that flexibility that they really want and now have become accustomed to? We're also seeing record employee turnover. So people are shifting jobs, shifting places that they want to work. A lot of that is triggered by, again, the supply and demand is there. And so they want to make sure that they're setting themselves up to have the work life balance and the career that they really want.

Heidi Grinde:

And they right now have the ability to jump around and do that. Compensation is quickly increasing. If you would have looked at six months ago, you can easily take what you would've made six months ago and the individuals, even within CLA that we're looking to hire are demanding 10 to 20% more, inflation's at 8%. So all of those compensation pieces are drastically increasing and that demand for additional compensation is there as well. And then a reduced work schedule. Again, with the pandemic I think a lot of people looked back at their lives and said, and I don't really want to be working 40 plus hours a week. So employer, what are you going to do to give me that work life balance that I want, and to be able to create that life that I want? And that is another thing that's really weighing on employers and being able to retain and keep the workforce that people really want to have.

Jessica Smith:

Great. I'll take it from here. Thanks Heidi. So all of these elements are understanding better really, how can we attract key talent? We have positions in our organizations, we have services to provide, needs to facilitate, and we need to be able to run. And so how do we do that? We need talent. We need people. Michael can offer some great solutions around automation and other ways for our organizations to meet our needs, but the people are really important as well. So all aspects of recruitment really starts with that first touch that a candidate has. A first interaction that they have with your organization through a job posting, through word of mouth. And then they look at your website, through an



internship fair or some other way that we have that first touch to connect with people who might become our employees. And at the same time, our own employees, as they look broader in our organization for future opportunities.

Jessica Smith:

And it all really starts with the organizational culture. This is something that some organizations are very intentional about. There's a tone, there's a feeling, there's an orientation to mission, vision, and values. Some organizations are in more of a startup mode or their leadership doesn't particularly see value in investing time or resources, and thinking about, what is our culture like? What is it like for people to work here? How do we tell people the story of what it is like to work here? Where might there be aspects of the experience of working here that turn some people away or make people not last as long with us as we might like?

Jessica Smith:

All of it orients around organizational culture. And certainly much of the broader conversation that is being heard today around diversity, equity, inclusion and accessibility ties into organizational culture as well. When we are thinking about attracting and retaining talent, that first piece, the candidate experience is enormously important. In many organizations, especially nonprofits, when they are under a particular time to hire, they are thinking about, how can I get my posting to be seen by as many candidates as possible? Or how can I get a hiring manager who already has too much on their plate to just work through these resumes kind of quickly so we don't lose people?

Jessica Smith:

They may not necessarily be thinking about the first time that a candidate sees your posting, your organization, they click through on their phone to apply, that first touch is incredibly important. It's a lot like that old adage, never have a second chance to make a first impression. So there are ways technology and other options that we can deploy so that it's a good or a better experience that first part. We know that recruitment really starts with everything else that can attract those great candidates to your organization and salary and compensation. You may have tons of resources to pay people to respond to those asks that Heidi was describing that candidates are making, or you may not, but either way you need to be able to retract people. And very often, although part of the conversation becomes, what are you going to pay me?

Jessica Smith:

What else do you have to offer me? The most important thing isn't necessarily that salary and compensation. And so the last piece when we're really being thoughtful and trying to be efficient in attracting and in retaining talent is ensuring that our job postings, our representation in the market is accurate. If we say that the job is an X, it shouldn't actually be an X and a Y, and like maybe a little bit of Z on Thursdays and Fridays when somebody else is absent. We want to be clear about, this is the role, roles change, expectations change, but we want to be accurate, we want to be clear and we want to be honest as much as we can. And then we want to be proactive in thinking, how can we reach our market as broadly as possible. [inaudible 00:09:57]

Heidi Grinde:

Jessica.



Jessica Smith:

Yes.

Heidi Grinde:

Oh, I was just going to say, I was going to add specific to that. I have been seeing a lot as it relates to job postings and stuff where people and organizations are really fine tuning and reviewing kind of the job posting itself to say, we want to be as detailed as possible. Because I do think, especially in the nonprofit space, we like to cross utilize positions. So you might be finance, but you're doing IT and you're doing HR, and you're doing a little bit of operations. And so really trying to detail out what the expectations are of the position, because oftentimes people, the quick turnarounds, the quick people, individuals that leave an organization, it's because the expectation of what they had does not match what they were told potentially. And so really trying to get clarity around that I do think is really important.

Jessica Smith:

Yeah. That is so true. It's a great point, Heidi. And another aspect to that I would say is there is a little bit of a balance to be found between, particularly for smaller organizations or positions where operations might mean a little bit of admin, a little bit of finance, all that you just said. There's a balance to be found between throwing the whole kitchen sink and all the things that that position could be responsible for into the posting. And being honest and saying, the primary focus, the essential responsibilities of this role are X and Y, opportunity to grow and learn, and support in whatever, A and B. Then that also is a way of framing that there's an opportunity to grow, to learn new skills and perhaps without making more of it than it is where there's a candidate that's on the fence like, Hmm. I'm not really sure that I want to do accounting pieces, no offense to anybody, but I'd really like someday to be able to be an expert in IT.

Jessica Smith:

Oh, this is primarily focused in accounting, but I'd be able to learn and support part of the IT function. Okay. Maybe this is a good growth opportunity for me. So we want to be thinking about, what are the other aspects beyond nuts and bolts, and dollars, and cents that will attract our candidates? Heidi mentioned some of these previously in the market. And these are some broad generalizations to say in the market or candidates ask for, or looking for, but these are some clearly discernible and consistent trends now. And that idea of balance, of flexibility, of benefits. And we often think of a benefits package as health insurance, medical, dental, and vision. But it may also be wellness benefits, a gym membership, a discount for those kinds of things, an employee assistance program that comes with your payroll platform, perhaps, that offers travel discounts and other kinds of benefits.

Jessica Smith:

And so we want to be creative and see what else we might have to offer. The submittal bullets here are better commute, better or good positive culture. Those are subjective to some degree. And sometimes it means that when we are posting and recruiting, and interviewing candidates, we don't know exactly what we are being compared to. But we can emphasize what are the positive aspects of our location or the flexibility that you don't need to come five days a week, or the flexibility in what our working hours might be, or the investments, time or energy, or actual financial investment that we are making in creating a warm and welcoming culture. And then these options, of course, we want to encourage people to experience the idea that they can grow and learn, and where there might be flexibility.



Jessica Smith:

The last one piece before I move on, employee appreciation recognition practices. This ties to culture, but this is also about, generally speaking, employees want to be recognized for their accomplishments. Not everybody wants it in the same way, but being able to represent to our candidates and to our employees that we are thoughtful about that. And we use resources like a shout out in a staff meeting or an email, or a special notice on our website, or whatever it might be to have a culture of praise and encouragement. So these are ... Go ahead Heidi.

Heidi Grinde:

Sorry. And I would just love, because I like to have it a little interactive too. If you guys, if your organizations have started to implement and, or pick up some of these additional benefits, if you could just put them in the Q&A area. Only because I think it's beneficial for other people to see and other organizations to see what everybody's doing. If your organization is doing something like this or has changed some of their benefit packaging.

Jessica Smith:

Yep. That's great.

Michael Pelletier:

I just wanted to jump in as well quickly, Jessica, on some of the commentary you had around greater responsibility and opportunity to grow. Those are certainly factors on the recruiting side, but they also, I've seen with some of the clients that we've worked with, helps on the retention side as well. We have a number of clients that we've gotten involved with to address some sort of automation need within their business. And rather than creating the solution and walking away, we've worked with some of the staff who have the ability to take on ownership and grasp the capabilities of some of these tools so that they can start to create their own automations.

Michael Pelletier:

Kind of like years and years ago when we all started learning how to use Excel to create our own solutions to problems. Some of the tools in the Power Platform like Power Automate for electronic workflow has been very powerful. And we have several clients where those employees who have embraced that have found a newfound interest above and beyond their day to day task in learning and using, and growing with those tools. So it's absolutely an important point.

Jessica Smith:

Yeah, definitely. And then we can run this poll in just one moment. That also can really tie into the recognition piece. So if you ask people, hey, we are thinking that maybe we could automate something. We could learn how to creatively deploy something like Microsoft Forms or some other tool. But we wonder if anybody's interested in that. And somebody raises their hand to do a bit of project management, do a bit of development. And thereafter, their name is named for having raised their hand, for having brought that innovation and putting in a little bit of extra time to help the organization achieve that. Okay. So we have our poll up and running, and we're hoping that you all will chime in on whether or not in your recruitment processes and also in your processes of moving current employees forward to new roles, what you are seeing.

Jessica Smith:



So it looks like in our poll, we are getting some great participation. And work life balance, hmm, was pretty high there on the list as something that is popularly sought after. Schedule flexibility. Schedule flexibility is sometimes hard depending of course, on what your organization does, especially if you're a nonprofit. Sometimes we have services we need to deliver that really can't be flexed, but there are a lot of opportunities to do that. And it looks like hybrid work arrangements. I'd love to know if we ran this poll five, 10, 20 years ago, whether we even have hybrid work arrangements as one of the choices in here. It's about 15% respondents noting that as something that they're definitely hearing. Employee appreciation looks pretty low and the better commute is also pretty low in popularity. Sometimes candidates may be self-selecting themselves for roles and making that decision about the better commute piece.

Jessica Smith:

Okay. So any other thoughts that you might have, as Heidi said, toss them into the chat and the question for us, and I will move on here. So where we've been talking about ideas to enhance recruitment, how would we know if we are making progress? Some of your organizations might have an applicant tracking system or might be using HR analytics dashboards in some way. At a minimum, trying to start to use what you have to track some of these key metrics in a recruitment time to fill positions. We all know what it is when you have a budgeted line and it's vacant, and nobody's in it. From the day that it becomes vacant to the day that you have somebody new hired into that role, getting a sense of how long that can take. And when you choose to add resources to a recruitment process, trying to get a sense over time of whether they affect, they reduce that time to fill.

Jessica Smith:

Communication touches. If you are using something other than, please just email me your resume, if you're using an applicant tracking system, something else, you can set up automated responses. And then you're very easily able to ensure that every candidate gets a response to their resume within for example, 24 hours, that they don't go more than for example, five business days without some kind of a contact, et cetera. Candidate reach is really about tracking to the degree that you can. Are you always recruiting from the same pool? Are you not expanding your geography at all? Are you consistently reliant on the same platform to try and do your postings?

Jessica Smith:

And the demographics of your pool. Organizations are in different places with their emphasis on diversity, equity and inclusion, but it's hard to know what progress you might be making, especially if that's important for you, if you're not tracking the demographics of your candidate pool. And that last piece around compensation evaluation is a complete other conversation of its own. But assessing, what are the salaries? What are the pay rates that you're offering for your roles? And how do they compare, vis-a-vis, the rest of the market? And so wrapping up here ... Go ahead Heidi.

Heidi Grinde:

I was just going to say, if we can pop back to that slide. So just out of curiosity, Jessica, because you are in the HR space, are there any specific guidelines that you could offer up on the number of interviews you should have a candidate go through? And the goal of, we would like to get through all of the interviews for this particular candidate in X amount of days, because I do think a lot of organizations struggle with that timeline and really getting the person in, interviewed and an answer to them in a timely fashion, which I do think causes organizations to lose out on some really great candidates as well.



Jessica Smith:

Yes, yes. And I would say rather than offer specific guideposts for searches in their timeline, I would start with, because they vary by position and they might vary by the market conditions for that position at that time. But what really does not change and is the first step to being able to set your own markers for those goal posts is, what is the process? So many times organizations start off by saying, we know as a minimum, two interviews is suboptimal. It's really not fair to the market. We'd like to be able to see a couple more candidates. But other times organizations say, well, we are three weeks into the process. We did 10 resume screenings. We've lined up three interviews, we're moving down the line. Oh, and this person now says they think they should interview too. So the process has gone from resume screening perhaps by HR, first phone screening, perhaps by HR to a face to face or an online interview with the hiring manager.

Jessica Smith:

Maybe one final. Has gone from that to, and they're going to do panel interview with these two people. And maybe these people who will be peers, a hang out would be really valuable for them to also interview. And that can really be a way that, not only does the process become extended, but coming back to the beginning, your candidate expected, give or take, these parameters, give or take, this number of interviews, and now it's changed greatly. So I would say the scoping changes, but the process, it should be known at the outset. And if that requires a 30 minute conversation to plan and have a plan that everybody who's involved can stick with, that's a 30 minutes, that's a good investment.

Jessica Smith:

Other sort of easy things like that 24 hours max from when a resume comes in to some kind of a response. And then I would say, no more than 48 hours from an in-person interview to at least provide an update. There are a lot of candidates in the market who will happily and rightfully complain if you give them the chance, that they had a first interview and a great interview, and then they heard nothing. And they're disappointed and their impression of the organization is not as positive when they finally get that update or even an offer, because time has passed and they didn't know what was happening.

Jessica Smith:

So I'm happy to talk more and more about this, but I don't want to vacuum up all of the time and the space. So let me just talk quickly before Michael can take away this show, on when we're thinking about retention. So we've gotten our candidates, we've done our good recruiting, and now we want to keep in mind, how can we know how we are doing in keeping people? Because turnover is a cost and turnover is a really important metric, and turnover across, in our organizations, across managers, across programs, across positions. If you see that you have a particular manager who over time the turnover of their staff is like 40%, that doesn't tell us the whole story about that manager, but it might open the door for us to uncover that something's going awry. How can we help? Exit interviews. So people do move on.

Jessica Smith:

Hopefully they move on after some time. It's a voluntary separation. Interns of course, are temporary. Making a practice and having something, again, the simple, Michael can give you better, but the simple using SurveyMonkey or Microsoft Forms to just gather that data, maybe having an ICE platform that does it, so you have an idea over time from your exit interviews, what are the top three reasons that your employees move on? What are the top three elements of working in your organization that they ranked the highest? Other qualitative feedback about your employee's experience. We think so much



about performance management as a way of tying to compensation, assessing whether people are doing well or not. But it's also a good practice to take a one zoom look up at all of our staff, vis-a-vi, their goals, and assess, how much do people accomplish? What their goals are in a year.

Jessica Smith:

How much do people meet milestones on time as those milestones were laid out in the beginning of a performance review process? If they're always falling behind, then maybe is there something that we can do from training or other support to improve our employee's success? So a lot of ideas to look at there. Last piece on retention key practices, how to keep our most important resource, which is our people. Rewards and recognition, we touched on. Stay interviews. Your high performers, do you sit down with them ever and say, what's working well? What makes you stay? What can you tell me that I can build upon for others?

Jessica Smith:

Targeting your managers for their skills in managing how they want to grow, how they're doing well, what they'd like more of. Promoting health and wellness. We saw it in the poll that that is seen as really important. And the last piece, bumps in the road. Many employees, many times, something goes awry, they make a mistake, there's a difficult moment with the manager. How is that handled? Is there a coaching process? Do you go right to discipline? Does nobody say anything about it? And does everybody know that until something really bad happens nobody says anything, there's no accountability? These are all aspects of thinking about how we retain people and how we grow people. I hope that that was helpful. Michael, all you.

Michael Pelletier:

All right. Thank you Jessica. So we're going to transition and talk about some of the technologies that have been useful in supporting this hybrid workforce. And it's not just going to be focused on technology in and of itself, it's going to be how those technologies can support the workforce and the people, and process component of that as well. Microsoft carried out a, what they called the Work Trend Index survey. It was conducted by Edelman Data x Intelligence in January through February of this year. This is actually the second year that they've conducted this survey. And the information that they gleaned from the survey, which is about 30,000 individuals across the globe, combined with data that's collected anonymously when an individual is using tools on the Office 365 platform, as well as metrics and information from LinkedIn, with respect to hires and moves that individuals are making in different organizations. They pulled all of that data together and came up with some top or key findings.

Michael Pelletier:

I'm not going to go through in detail all of these findings, but did want to raise these as topics for discussion. I would certainly encourage you simple search online, Microsoft 2022 Work Trend Index. You'll find the paper, it's about 50, 60 pages long, but it's a great read and focuses on these five things. So employees have a new worth it equation. One of the big questions that have been being asked is, is it worth it? Is the time and effort of going into the office, of dealing with the various things that I have to deal with worth it? That whole work life balance question that was at the top of the list that Jessica surveyed you all on. That is a question that everyone is asking themselves.

Michael Pelletier:





And there's no single answer to this, but it's really understanding the priorities of the individuals in an organization. If you looked at the top answers to the things that employee is interested in, it wasn't until, and this is especially true for gen Z, it wasn't until you got to number seven that pay and compensation was mentioned. And that's really important today. The second is that managers feel wedged between leadership and employee expectations. So I'm sure that many of your organizations, and this varies tremendously upon or based on the industry that you're in, but within the NFP space, there's a lot of things that can be done in a remote way. There's a lot of things that can't be done in a remote way. And so how do you bridge the divide? Where from a leadership perspective, you might be saying, we need to have everyone back in the office, but from an employee perspective, you're not. And that's where that divide exists.

Michael Pelletier:

And the manager level is the one who needs to try and figure out, and navigate that process. And so, one of the things that we've been encouraging our clients to do and is one of the recommendations here is to put together a team agreement for, whether it's the marketing team or the operations team, or the sales team, or whatever it happens to be, rather than having it be a full standardized process for the company as a whole, take it at that team level. And this way it can make it work more effectively and empower your managers to work with their teams to do that. A couple others on here. Leaders need to make the office worth the commute. So establishing those standards for when people should be in the office versus when they shouldn't be, why it would make sense for them to get there.

Michael Pelletier:

If you say, all right, everyone needs to come in today for one hour meeting. That's really not an effective way to start getting folks back in the office. But putting together a reasonable and measured approach to, all right, Tuesdays and Wednesdays, those are our collaboration days. That's when we should all be brainstorming. That's when working together makes sense. And then Monday, Thursday, Friday, we all execute and that's when we're remote, and that makes sense. Flexible work doesn't have to mean always on. We're going to dive into this one a little bit more in a couple of slides. And then rebuilding social capital looks different in a hybrid world. One of the biggest challenges that many of the individuals who maybe joined an organization over the last couple of years is that they weren't prepared for how they should be building their social capital.

Michael Pelletier:

In terms of creating relationships with individuals, unless you were very practiced at it. It's quite a bit different to create a relationship with someone virtually than it is when you see them in the hallway and can grab lunch with them. And so this is something that we've seen a very important role for the manager to take on, in helping to facilitate and move forward those interactions, and kind of almost foster an environment where they can happen so that relationships can continue to be formed. And this is something that every organization is going to continue to look at as time progresses.

Heidi Grinde:

And Michael, there was a, somebody had commented, seems like work life balance is really a definition unique to each employee. And I think that plays into number one a little bit too, that it definitely is. And I'd be curious if you guys differed in that opinion. What makes somebody tick is different from every other person and what I want my work life to be is going to be different. And so a lot of time does need to be invested to really figure out for each employee within your organization. And I do believe, and I do



strongly advocate for, if you invest that time, the retention of employees and them feeling like they are valued, and you are listening to them, and you're working through, how can you make their experience at work work for them and work within how they want their work life to be, you're going to be able to retain and keep your employees a lot longer.

Michael Pelletier:

Absolutely. And I think it's more, or also important to note that there are some very clear lines that get drawn between the generations, baby boomers, gen X, millennial, and gen Z, in what they find is most important. So that's just another factor to keep in mind as you're understanding your employee. So one of the biggest challenges that many businesses face today is the fact that they don't know how to run meetings anymore. And I don't mean that in a bad way, but for years, we would get into a conference room and we would have, somebody would walk in, next person would walk in, they would start having some conversation. And then soon enough you'd have four or five people and the meeting would go and start. And then you'd be like, oh, wait, we got to get Jane on the phone.

Michael Pelletier:

We got to dial her in. And then Jane would dial in and then you'd have your conversation. But then throughout most of that meeting, Jane wasn't participating, nobody knew if she had questions, because kind of jumping in is a little bit hard as a remote participant. But that was okay because we all expected everyone to be co-located in an office, in that meeting room. And then things flipped where everyone, plus or minus, was remote and we all had the same playing field, if you will, it was leveled. We were all just a head on a screen, we had to figure out new ways to interact. And that was great. But then some of us went back to the office and when we're back in the office, and the number of individuals who this effects varies, you need to think about how you can continue to have that same sort of interaction that existed but now only where you've got some in the room.

Michael Pelletier:

So very first person into the room, they should get the teams meeting started or the Zoom meeting, or whatever technology you're using. This way, whoever's on the line can start to join in that chat. This way they can build some of those relationships we were talking about a minute or two ago. And once everyone's in the room or online, make sure you've got an agenda and that you run through it, that there's a moderator if it's a large enough meeting. It can be very difficult if you've got a long meeting with no agenda for people to pay attention, be they in-person or remote. So that's important as well. Using things like a portable speaker or room audio, if you're using teams is another important technology component so that you have good quality audio.

Michael Pelletier:

There's nothing worse than being on a call and having a hard time hearing the person who is at one end of the table because somebody just brought their laptop in and that's all they're using for the audio connection. Hit record and use live transcriptions. This is great. Especially for recurring team, group collaboration type meetings. If somebody can't make a meeting that day, they can quickly either watch the video or just review the transcript to identify things that might be relevant to them. Again, if you, or not again, but just a reminder, I should say, if you are recording other participants outside of your organization, you definitely need to make sure that you get permission from them to do a recording, depending on your state's laws.



Michael Pelletier:

Use the raise hand feature. This is a great way to make sure everyone's able to participate. Be intentional about including those virtual attendees. Check in every now and then. Make sure that you're paying attention to the chat. Ask the participants that are remote, hey, how are you guys doing, any questions? And so forth. Send a recap and next steps so everyone's clear, and then try to take five between meetings if you can. It's good for your brain. I mentioned these things because it's really difficult to go from one meeting to the next meeting, to the next meeting, and then remember what happened three or four meetings ago. So that recap is really important.

Jessica Smith:

Can I just offer one comment here as well? These are all excellent practices. And in addition to just making the time spent in meetings and a little bit of the time spent between meetings more productive, all of these practices, as well as some others are really supportive of diversity, equity, inclusion and accessibility for everybody who is participating. Much of past practice in meetings was predicated on the idea that everybody came into the meetings, saw, heard, experienced, took notes, processed information, needed or didn't need prep time in the same way. And the view is definitely much more expansive now and intentional as well. And so these types of practices, agendas that are sent out in advance, just intentionality about really being inclusive is also core for organizational culture as well.

Michael Pelletier:

Absolutely. So another component that was highlighted is just that this concept of digital overload is very much a thing. Over the two year period of time, there's about 150% increase in the number of meetings per person. 32% increase in, I can't read that, there we go, in chats per person. 28% increase in average after hours work and 13% in the average workday span. And so the takeaway from this slide is that if you aren't managing your time and your day effectively, you can very easily find yourself being overloaded. So how do you address that?

Michael Pelletier:

Well, one of the things that we've seen organizations move to with some great success is taking control of when you are meeting. So fewer meetings are now starting early on Monday. Likewise, they're not happening at the end of day on Friday. What you're looking at here is a heat map, if you will, of the percentage of meetings that are happening during any given time period, with the darker color being most prominent. So you can see in 2021 we were a little more all over the place than we are now in 2022, with respect to where the concentration of meetings is occurring.

Heidi Grinde:

Michael, I will add, I mean, and this is even internally, I think within CLA because CLA is not immune to kind of everything that's happening in the marketplace either is, we would often hear during the pandemic employees, including myself even, saying like, wow, I feel like I'm working so much more. I'm working so much more. And if you really look at it and step back, this slide and the one prior really hits on it. Because yes, you might not be commuting now and you're working from home, but you have the ability to be plugged in all the time. It used to be, oh, I can't work because I'm not in the office. Well, now we know that everything can be done remotely for the most part. And so you do have the ability to check your emails. You do have the ability to log into your systems.

Heidi Grinde:



And so, I think one of the benefits to an organization is to really try to have a culture of, when you leave, you leave. You have working hours boundaries, and yes employees can have that flexibility if they so choose. But really trying to focus on, we don't want you to be sending emails at seven o'clock at night. We don't want you to be working on the weekends, even though you have access to it. And making that an okay choice, I think from a culture standpoint for your organization is important.

Michael Pelletier:

Absolutely. So we're going to take a quick poll now. And the question is, do you feel like you have too many meetings and are waning energy and focus because of back to back sessions? I'd be surprised if we didn't have a large majority here, but okay. All right. So some folks have been able to figure out how to manage their schedules, which is great. We're going to talk about a couple of tips on the next slide here. Just let this survey run another second or two.

Michael Pelletier:

All right. So I must admit that I'm a bit surprised. I was expecting to see a good deal more individuals on the yes side, but yeah, that's okay. Maybe we've got an audience here that's really good at managing their time. I can admit that I've struggled with this myself. I know many colleagues and many clients who do as well, and so have started to adopt a few different practices. So let's go over to that slide here. And so it's all about how you make it sustainable. If you're looking at your calendar and you have too many meetings. Start assessing whether you can cover it via email or a chat instead. This is something that can very quickly transition what might have been a 15, 20, 30 minute scheduled meeting into an email that you can quickly pull together, send it out.

Michael Pelletier:

And then if anybody has any questions and wants to talk about it, then maybe schedule a quick one-on-one chat. But a lot easier, a lot more effective than having a whole meeting. Blocking focus time. There are often days where personally I'll end up with meetings start to finish. And when do you get the work done? That happens at the end of the day. So putting some focus time in your calendar can also be very important to help with that. Using required and optional when you're inviting folks to meetings so they know whether it's just a courtesy that you're extending them or whether they really need to be there. If you've got some waning energy or focus due to back to back meetings, sharing that agenda can be very helpful. This way if people aren't going to focus, at least they can focus during the times when it's a topic that is in relevant to them.

Michael Pelletier:

And because they know the agenda, they know that when we start talking about topic X, all right, I'll pay attention, I'll have their focus. And it just establishes a way to make things work a little more smoothly. Establishing some breaks. I mentioned taking those five minutes. There are actually some settings you can turn on if you're using Outlook, for example. So that when you schedule a meeting, if it's a 30 minute meeting, it'll automatically get scheduled for 25. If it's a 60 minute meeting, it'll automatically get scheduled for 45, for 50, whatever makes sense. But that's a setting so you don't actually have to manage and change the times, which could be kind of challenging on a one off basis. It's just set and forget, and now you've built some time into your calendar to get a glass of water, for example.

Michael Pelletier:



And then, if you're either challenged yourself or worried about folks on your team dealing with chats or emails outside of working hours, this is something that can also be important by using things like delayed delivery, setting expectations with your team on when they should be responding and using not urgent in the headline of your email or using the priority setting. So we're coming up on time here, but I did want to just share a quick story about a social services nonprofit we did some work with. And this is all in service to now being in a hybrid world.

Michael Pelletier:

So they were in the business of supporting conferences and webinars, and the others required a tremendous amount of coordination around logistics, content, attendees, materials. And they tracked all of that in spreadsheets that were on their network. And it was a process that worked for them. But once they went remote and hybrid, it became more challenging, and not only access to the information, but also keeping track of it, making sure it was up to date. So there's a number of tools that are available in the marketplace. I mentioned earlier, using things like the Power Platform with an electronic flow and workflow solution.

Michael Pelletier:

We stored the data and the information in SharePoint and Dynamics CRM, and provided a solution that was able to streamline the whole of the process, centralize all of the materials that they might need for a particular event, and see, and track approvals around changes, set up reminders and track outstanding tasks. And so this project is something that folks within that organization now own and keep up to date, and has really spurred some new interest for some of the folks from a career growth perspective. So now I will turn it back to Heidi, I believe.

Heidi Grinde:

Awesome. Thanks Michael. And I will say, after this, I will probably connect with you to figure out what that setting is on Outlook to have those meetings do that for five minutes. It's a cool little feature that I was not aware of. All right. So as we get close to wrapping up today's session, I want to just briefly touch on some alternative staffing solutions that we have started to see amongst our clients. Some of them are not new, they've been around. But we are, I mean, as organizations, you do have to start to get creative in the current market that we're in if you're unable to find a full-time hire to fill the different positions within your organization.

Heidi Grinde:

So we'll touch on technology utilization, the sharing of employees, hiring non-accountants and then outsourced accounting, some and or all of the accounting function. And I'll even go as far as, it's not just accounting, they can be all other pieces of the organization that likely there is some type of outsource solution for. So we will do a quick poll question. How many of you feel like your organization has adopted new software to help add efficiencies in the past two years? Give you guys a little bit of time to answer that.

Jessica Smith:

And while they're answering that, I'll make my plug that there's lots of alternative and outsource options to support HR functions.

Heidi Grinde:



Yes. So I'm actually not surprised by the results on this and I'll give it a little bit more. I was speaking to, Jessica was there, to a group of nonprofit organizations, and was actually quite surprised with how many of them that were there had not adopted some of the technologies that I feel like are definitely time savers over the past couple of years, especially with the pandemic and so much being remote. Was a little bit surprised to see that they had not adopted it. So we're ending at about 28% that say no, but they wish they would have. And then over 70% that have looked to adopt some type of technology to add some efficiencies over the last couple of years. So if we look at really great technology solutions, and this is honestly, would be one area that I would look to start in sooner than later, is the ability to be able to do more with less.

Heidi Grinde:

And when I say less, it's actually man time, people time. So reducing the time needed for transactional processing. That can sometimes be the biggest volume, whether it's related to grants, payables, credit cards, what have you, those tedious transactional type things that take a long time. If you can start to implement a bill payment system example, Bill.com, Credit Card Management System, Tally, Expensify, CRM Feeds, where the donation module, so your CRM modules automatically linking to your accounting software. People don't have to sit and reenter everything. Automatic bank reconciliations. These are just a couple, and again, specific to the accounting area, but there's a ton of tools that have been developed that can really help organizations streamline processes. And with that additional time, free up people to be able to do other tasks within the organization. Again, if your organization has not adopted some of these things, cost benefit wise, highly recommend. It is there.

Heidi Grinde:

It's going to make you more efficient and it's going to free up time in your organization, especially if you're having a difficult time hiring for some of those positions. Alternative staffing solutions. So sharing is caring. This is one that I found really interesting, and I've ran into it a couple times on some organizations that I work with, but I do think it's gaining popularity where you maybe don't need a full-time admin person, let's say, or you maybe don't need a full-time bookkeeper. You maybe don't need a full-time HR person. One organization actually hires them and there's some type of agreement that is set up between the two organizations where they will toggle back and forth serving both organizations. So the difference with this is they are an employee. You would have the cost associated with benefits and what have you, but you kind of loan them out.

Heidi Grinde:

And it's a mutual agreement between the organizations. The pros to this, obviously you're sharing costs. You don't need to have a full-time employee for a position that isn't full-time within your organization. Employer attention. Typically, the people that hold these roles like it. They're able to jump between different clients, see different things, be challenged a little bit more, have a little bit more flexibility in their working day. And then also the knowledge share. So the knowledge share between the organizations. If you have similar type missions, being able to cross utilize people can be really beneficial. Cons to this. Competition for time. So this is always something where, again, if the person that you're sharing enjoys organization A more than organization B, you may end up with some difficulty there as it relates to competition for time.

Heidi Grinde:



Are they being responsive? Are they giving the time that they said that they were going to give to both organizations? Communication breakdown. Again, making sure that we have strong communication between both organizations, as far as what that employee is doing, the time commitment for each organization. And then I think, regardless, not that nonprofits compete or organizations compete. But if you did have, or did have similar missions and what have, are there things being shared between the organizations from a strategic standpoint that you wouldn't want to have happen?

Heidi Grinde:

So again, just kind of keeping that in mind. But I do think it is something that, again, is starting to increase in popularity and something that more organizations are willing to try overall. Alternative staffing solutions. Hiring non-accountants. And again, this might be non payroll people. This might be non HR people, non-technology people. Do they have the ability to learn the position and are there benefits to hiring and, or looking outside of the typical profile that you would have?

Heidi Grinde:

What are the pros to this? It broadens your talent pool. Obviously more people are going to be able to apply. And again, it could be a different perspective. Cons to this. They may lack the technological knowledge for that particular role. So if you hire a non IT person, you have to be willing to invest the time and to train them. Similarly, HR, similar, accounting. So do you have the ability within your organization to train that person? Do you have the resources? If you do, it could be a good solution. I think there's a benefit at the, potentially like entry level positions in the organization, if you have somebody that's more experienced that can invest the time and can work to train that individual. And then finally, outsourcing. This has been something that has been around for years, but again is gaining in popularity.

Heidi Grinde:

Obviously you're working with an outside organization to handle your HR functions, to handle your IT functions, to handle your accounting functions. And so, again, the responsibility for staffing, if you have staffing turnover, what have you, that organization is responsible to replace them. You don't have to sit and try to find somebody. They have to sit and try to find somebody. Ability to add efficiencies. Typically, when you're looking at the outsourced space, all they do is IT, all they do is accounting, HR. They have that industry knowledge, that specialization, where they're going to be able to look at your systems, look at your staffing, and really work to try to provide the efficiencies that you need, as well as add in different softwares that will benefit your organization long term.

Heidi Grinde:

Cons to this. They may not be on site every day. You may not be able to walk down the hall and talk to IT, talk to accounting. So you have to be okay with that as an organization. Require certain systems and platforms. Depending on who you work with, they might require you to use, let's say, for payroll, ADP or QuickBooks online. So again, weigh the pros and cons to that. And then you don't get to pick your team necessarily. So you may get to pick some of them, but if you have a full group of HR professionals, you may not get to pick every single one of them that works with your organization. So just be mindful of that as well.

Heidi Grinde:



And I think we are at time, we have one minute to spare. If there were questions that remained unanswered, we will get back to you guys. Feel free to reach out to Jessica, Michael, and or myself if you have questions. Our information's up there. It's been great to connect with you. And hopefully the session brought some amount of wisdom and or clarity as it relates to the workforce challenges that we are currently all facing.

Michael Pelletier:

Thank you.

Jessica Smith:

Thank you. Thanks everybody.

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