

A photograph of two women riding bicycles on a city waterfront. The woman in the foreground is wearing a white sweater and a grey scarf, riding a yellow bike. The woman behind her is wearing a dark jacket and a white hat, riding a black bike. The background shows a city skyline across a body of water. White musical notes and a line drawing of a dog are overlaid on the image.

Reimagining Your Workforce

Create Workforce Opportunities

WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor



Create Opportunities

Disclaimers

The information contained herein is general in nature and is not intended, and should not be construed, as legal, accounting, or tax advice or opinion provided by CliftonLarsonAllen LLP to the user. The user also is cautioned that this material may not be applicable to, or suitable for, the user's specific circumstances or needs, and may require consideration of non-tax and other tax factors if any action is to be contemplated. The user should contact his or her CliftonLarsonAllen LLP or other tax professional prior to taking any action based upon this information. CliftonLarsonAllen LLP assumes no obligation to inform the user of any changes in tax laws or other factors that could affect the information contained herein.



Learning Objectives

By the end of this session, participants will be able to:

- Discuss ways to reimagine your workforce
- Summarize workforce planning and aligning strengths
- Review and enhance your HR policies
- Identify ways to attract talent and grow





Workforce Planning

Sarah Conroy

WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor

Workforce Planning – A Primer

- The art and science of organizational design & workforce planning
- Why it matters
 - Re-aligning resources to organizational need
 - Ensuring the sustainability of the organization as well as to help remunerate and resource employees effectively



Workforce Planning – Key Terms

- Company level v. US workforce planning – how this impacts your company's ability to attract and retain talent.
- Succession planning - a part of workforce planning dealing specifically with how to ensure no talent gaps by intentionally creating a pipeline for key company roles
- Organizational design - a methodology designed to identify dysfunctional aspects of work flow, procedures, structures and systems, realigns them to fit current business realities/goals and then develops plans to implement the new changes.



Workforce Planning – Where to Begin

- Strategic HR Assessment of your organization first then cultural alignment and any build required can be from the ground up.
- The value of the job description (*won't job postings suffice?*)



Getting the Buy-In

What's in it for your organization and your employees?

- Reducing misalignment of resources
- Planning for the future of the organization and employees' place in it.
- Inventorying all talent in the workplace for retention, promotion, succession planning and more.

Likely Outcomes

- A new organizational design emerges – possibly more teaming with a matrixed workflow
- An overall understanding of how each person's efforts are connected to the efforts of all others so gaps can be identified and addressed to prevent any problems that could arise.
- Employees think of their efforts as part of the larger whole and take broader ownership



Parting Thoughts

- Not just one and done, must have processes to realign resources ongoing
- Will most likely result in greater retention, fewer absences, greater productivity, improved employee relations



Thank You!



Sarah Conroy, SHRM-SCP, SPHR, CEBS
301-902-85029

sarah.conroy@CLAconnect.com

Sarah is an HR Consultant with more than 30 years of human resources experience including director of human resources for both for profit and nonprofit organizations, as well as consulting within these industries: tech, fedgov contracting, higher education, nonprofit agencies, healthcare, manufacturing and financial services.. Her focus areas include employee relations, performance management, workforce and strategic planning, compensation and benefits design and delivery, compliance, and communications.

Sarah approaches each of these areas giving careful consideration to short-term goals and long-term strategy to help her clients balance care and concern for their employees with organizational sustainability.



Review And Enhance Your HR Policies

Jessica Smith

WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor

Human Resources Policies

- What is the Why?

(<https://simonsinek.com/commit/the-golden-circle>)

- Can policies be exciting? (*Yes!*)
- Critical HR policy areas today
- Keys to success (*even if you're still trying to figure it all out*)

Critical HR Policy Areas Today: Internal-facing

- Audience:
 - HR, Finance, Executive
- Focused on:
 - Core practices
- Functions:
 - Recruitment
 - Compensation
 - PTO
 - Employee Resources



Critical HR Policy Areas Today: External-Facing

- Audience:
 - Employees
 - The public
- Focused on:
 - Culture
 - Core Practices
 - Stated policy and its evolution

Critical HR Policy Areas Today: External-Facing

- Functions:
 - Compensation
 - Mission/Vision/Values
 - DEI
 - Remote Work
 - Anti-Harassment and Anti-Discrimination
 - Scheduling
- *Critical and unclear:*
 - *Workers Comp, Liability Shields*

Those keys...

- Know and state the core principles you're considering.
- Policies can only do so much. Organizational culture is essential to success.
- Transparency might be the most important - as a value, as a practice.
- Be future focused.
- Communicate broadly.



Thank You!



Jessica Smith

646-732-5441

jessica.b.smith@CLAconnect.com

Jessica's Human Resources approach balances coaching, organizational development, and effective management with expert and careful oversight of comprehensive HR functions.

With a background including management of social services programs and 4+ years as an adjunct professor in a competitive Master's Degree program, Jessica's HR experience spans more than 10 years, with in-house roles such as Director of HR and National Director of Organizational Development. As a consultant, Jessica's projects have included strategic planning; HR assessment; HR function design; player-coach HR administration; leadership coaching; organizational development programs including race equity, diversity, and inclusion initiatives; and full cycle recruiting support, including C-Level positions. Jessica has a special passion for the process of discovery, design and implementation of comprehensive HR Information Systems including solutions for performance management, integrated payroll, ATS (recruitment), and personnel budgeting.



Identify Ways To Attract Talent & Grow

Octavia Gilmore and AJ Monterrosa

WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor

Attracting Tomorrow's Talent in Today's Market



Employee Experience = Growth

Most organizations' strategies default to process improvement and transactional care of employees. With today's changing workforce, you need to emphasize the use of human behavior insights to bring out the best in people and truly optimize your business performance through talent

- Easy hiring process vs. True job fit
- Knowing the mission vs. Connecting with the mission
- Nice Manager vs. Great coach



Employer Brand versus Talent Brand

Passive Candidate
Index



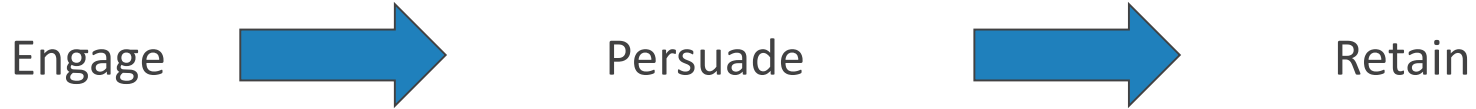
Growth and Development

You must take an active role in the development of your employees to demonstrate confidence and genuine concern for the future of the organization. This gives employees the feeling of significance, community, and value. When you create a culture in which employees can reach their goals and know their thoughts and insights are appreciated, you boost productivity, morale, and engagement.

- Encourage professional development
- Create a development plan
- Pair employees with mentors/coaches
- Help them build their professional network
- Challenging assignments
- Trust your employees



The Competitive Edge



Thank You!



Octavia M. Gilmore, HRM
301-902-8507
octavia.gilmore@CLAconnect.com

Octavia is a Professional Search Advisor with an extensive background in both human resources and professional search advisory. Her passion is in serving Not-For-Profit organizations and providing guidance on Diversity & Inclusion and Racial Equity initiatives.

In her role with CLA, she is an authority in the not-for-profit space, leading professional search in the areas of finance, operations, programs, fundraising & development. Octavia has served non-profit clients spanning a wide-range of causes and missions throughout the United States.

Her value proposition entails serving as an advisor and business partner, organizational branding coach and providing innovative solutions towards strengthening talent management, employee retention and recruitment best practices.



AJ Monterrosa
781-402-6336
alan.monterrosa@claconnect.com

AJ Monterrosa is a solution-oriented Professional Search Advisor helping Manufacturing & Distribution/Supply Chain organizations build and execute effective workforce strategies. AJ's ability to provide clients with a strategic solution that is executed to completion is what makes him different.

His approach and commitment to fully understand his client's business and talent objectives are foundational to quickly align his team with the talent market to ensure the right process, people, and timelines are met.

AJ served as a Sergeant in the United States Marine Corps, successfully completing tours in Iraq and Afghanistan while leading a team of Marines. With over seven years of recruiting and consulting experience, he is currently leading the Professional Search efforts for Manufacturing & Distribution/Supply Chain, creating opportunities between our clients and accounting, finance, HR and operational professionals on a national scale.

QUESTIONS?



CLAconnect.com

©2020 CliftonLarsonAllen LLP

Sarah Conroy
301-902-85029
sarah.conroy@CLAconnect.com

Jessica Smith
646-604-0037
jessica.b.smith@CLAconnect.com

Octavia Gilmore
301-902-8507
octavia.gilmore@CLAconnect.com

AJ Monterrosa
781-402-6336
alan.monterrosa@CLAconnect.com

