

Tips/Techniques
for
Top Performers
Effective Hiring and Record
Retention

Jessica Johnson
Charter School League

Cinda Daggett
President, HR Department

February 22, 2013

Presentation Overview

- Effective Hiring
- Transitioning to an Employee
- Offer Letters vs. Employment Contracts
- Record Retention

Effective Hiring “Hire Right the First Time”

- Cost of bad hiring = 25k-50k
- Top 6 Reasons for a bad hire
 - No set goals for the position
 - No outline of role/responsibilities
 - Expectations are unclear
 - Poor interview techniques
 - Not checking references
 - Hire too quickly

Steps for Hiring

- Prepare ad
- Post internally
- Use your network- good people know good people
- Remember “just because someone was a good employee elsewhere, does not mean they will be a good employee for you.”
- Train your interviewer- give them some relevant questions

Effective Interviewing

- Setting for the interview is important
 - Quiet and private
 - Turn off the phone, limit distractions
 - Be prepared
 - Probe/ask for details
 - Situational interviewing
 - Have job description handy

- Review Goals for Position
- Watch body language
- Know what your “deal breakers” are
 - Experience
 - Certifications
 - Minimum knowledge level
 - Minimum skills level
 - Minimum ability level
- Interview Questions
 - Probe
 - Wait for answers
 - No “open ended” questions
 - Behavior based questions

- What weakness in the school does this fill
- Gather feedback from others
- Mandatory reference checks
 - Ask reference person for another reference person
- Make verbal offer/follow up with offer letter or employment contract

Questions Not To Ask

- **Do not ask questions about**
 - Age
 - Political Affiliation
 - Children
 - Married or not
 - Transportation
- **Do ask questions about**
 - Past job relevancy
 - Current skill set for success/Does it match your job
 - Job expectations
 - What is their motivation for success

Colorado Law Regarding Background Checks

- C.R.S.- 522-30.5-110.05- Background checks
- C.R.S.- 522-30.5-110.7- Fingerprint Based, Criminal History Checks
- C.R.S.- 58-2-114- Immunity from Civil Liability for Employer Disclosing Information

Transitioning to an Employee

- Good orientation
- Find out what the employee needs to be successful/
how does the employee want to be managed? Does
your management style fit their needs?
- What is the best way for you to communicate what
you want

Offer Letter

VS.

Employment Contracts

- Employment Contracts
 - Make sure “at will language” is included
 - Make sure terms and conditions for firing are laid out
 - Best to leave benefits out unless you list ALL benefits and reference that they can be changed
 - Make reference to Employee Handbook if you have one

- Offer Letters

- Shorter in size
- Make sure you have “at will language”
- Still a contract
- If they need to sign non-disclosure agreement, mention it
- Don’t put benefit information in offer letter
- Make reference to Employee Handbook if you have one
- Make sure salary is stated monthly or per pay period, but not annually

Record Retention

What to Keep
and
How Long

Retention; Employment History

- Job application
- Resume
- Resume Cover letter
- Phone prescreening notes
- Interview and selection notes
- Education verification
- Employment verification
- Employment and personal reference checks

- Other background checks and verification
- Rejection letter (not many companies use this)
- Position job description
- Job analysis records
- Job offer letter or employment contract
- Employment agency or temp agency agreement, if used
- Emergency contact information
- Signed employee handbook acknowledgement form showing receipt of employee handbook

- Checklist for new employee orientation showing topics covered and by whom
- Any relocation agreements and documentation any contract, written agreement, receipt, or acknowledgement between the employee and the employer (such as a non-compete agreement, an employment contract, etc.)
- Employment official forms including: requests for transfer, promotion, international job applications, and so forth
- Any other documentation related to employment

Retention; Employees Performance Development and Improvement

- Copies of any performance appraisal used or employee development plans
- Employee self-assessment
- Records from any formal counseling sessions
- Notes on attendance or tardiness
- Performance improvement plan documentation
- Disciplinary action reports
- Employee recognition material such as certificates, recognition letters, etc.

- Employee formal suggestions and recommendations, organization responses
- Training records
- Requests for training
- Competencies assessments
- Training class or session notifications or schedules
- Training expense report
- Complaints from parents or co-workers

Retention; Employment Termination Records

- Employee resignation letter
- Exit interview documentation
- COBRA notification
- Employment termination checklist
- Final accounting for all aspects of the employees employment such as final paycheck, vacation pay, return of company property, etc.

Retention; Employee Medical Records File

These records are not personnel records and must be kept separate from personnel records. Only a few people should have access to these records, including the employer and HR.

Supervisors generally do not have access to the records.

Supervisors should only be provided with the information they need to assess appropriate work accommodations if there is a request for one.

- Documentation of work related injuries or illness
- Family Medical Leave Act documentation
- First-aid incident reports
- Hazard exposure records
- Medical examination records
- Records of health or disability limitations
- Release consent forms
- Return to work forms
- Short and Long-Term Disability documentation
- Work-related injury documentation, accident and injury reports, including OSHA- required documents

- Health insurance application forms
- Life insurance application forms
- Applications for any other employee benefit that might require medical information
- Requests for paid or unpaid medical leaves of absence
- Physician's examinations, notes, correspondence, and recommendations
- Medically-related excuses for absenteeism or tardiness
- Medical job restrictions
- Any other form or document that contains private medical information about an employee

Retention; Other Separate Files

The following records should be kept separate from personnel and medical record files, with restricted access (generally, supervisors should not have access)

- I-9 Forms and documentation
- Drug Tests
- Background/Credit checks
- EEO Records
- Payroll files

For more information contact:

Cinda Daggett

cinda.daggett@comcast.net

303-652-2277

Jessica Johnson

jmjohnson@coloradoleague.org

303-989-5356