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President & CEO – Monterey County CVB

RE: Executive Summary of 2018 HR Audit and Engagement Survey

Fired-Up! Culture was contracted by the Board and Leadership of the Monterey County Convention and Visitors Bureau (MCCVB) to complete two distinct, but interconnected, processes evaluating the People and Culture activities of the organization. During the months of January and February 2018 our team completed both a comprehensive Human Resource Audit as well as an Employee Engagement Survey.

This Executive Summary is intended to summarize each process as well as provide key findings and recommendations. Additionally, we have provided a detailed report for each process to the MCCVB Leadership for further review.

Employee Engagement Survey

The Engagement Survey process included a foundational data-driven online survey, the Fired-Up! Index™, as well as a series of brief telephone interviews. All MCCVB team members were invited to participate in both the online survey and phone interviews. 85% (30 of 35) of the MCCVB team members completed the online survey processes. 97% (34 of 35) of team members completed the one-on-one phone interview. The Visitors Center team represented the largest number of non-participants. However, we consider the participation levels overall to be high and continue to speak to the strength of the transparent and healthy culture present in the organization. It was clear throughout the entire set of activities that team members took this process seriously and wanted to be active participants by providing candid and transparent feedback to help the MCCVB to continue to get better.

This is the fifth consecutive year we have completed the engagement survey process for the MCCVB which allows us to look at current issues and opportunities in the context of year-to-year results.

As a result of the completed engagement survey processes, it is clear that the organization continues to be healthy, engaged and thriving. Of the 18 core areas measured and considered critical to achieving and sustaining a healthy work culture, the MCCVB year to year scores continue to be exceptionally strong. The results for the MCCVB this year were outstanding with 89% achieving a benchmark and many reaching the highest tier of scoring.

We are extremely pleased to see that the 2018 survey results are a reflection of the continued work and diligence of leadership to address key areas including collaboration across the organization.

Engagement Survey Recommendations:

Our processes are designed to assist leadership focus and prioritize some areas for improvement. The recommendations as a result of the engagement survey are as follows:



1. Build on the gains demonstrated over recent years in regard to performance feedback and coaching by continuing to invest in a leadership culture at all levels.
2. Continue to design and implement systems to help team members achieve desired results while creating stronger communication and autonomy.
3. The foundation of any healthy business culture is Trust. Continue to find ways to strengthen trust in all relationships across the organization.
4. Find additional ways to build in team-time for cross functional relationship building, connectedness, shared goals and collaborating in the delivery of results.
5. Continue to look at compensation and benefits offerings to attract and retain talent.
6. Communicate key themes from survey, action plans and progress of action items.

Human Resource Audit

The Human Resources Audit was completed to evaluate the organizational effectiveness in implementing and utilizing HR systems and processes to ensure full legal compliance along with supporting overall people and culture best practices and strategies found within forward focused organizations. The audit process completed included a review of regulatory processes and practice, employee and supervisory policies, job descriptions and classifications, employment related systems, and full compliance with federal, state and local employment laws.

The HR Audit results continued to show strong improvement and application of recommendations from previous audits.

The following is a summary of the results from the 2018 Human Resource Audit. Details of these recommendations and greater specifics related to the findings can be found in the full report.

16 out of 21 areas received GREEN (In Compliance and no perceived issues or concerns)

- Personnel Files – Record Maintenance
- Personal Files – Record Retention
- Position Postings
- HR Brochures & Handouts
- Independent Contractor Reporting
- Meal & Rest Periods
- COBRA
- Emergency Preparedness
- MCCVB Injury & Illness Prevention Program (IIPP)
- Workers Compensation
- Selection – Pre-Application
- Job Applications
- Selection Interviews
- Selection & Hiring Processes

- Employee Orientation / Onboarding
- Performance Plans and Review

4 of 21 areas received YELLOW (Possible concern and potential of liability exists)

*All items listed are RECOMMENDED for CONSIDERATION of change in practice or language. Recommendations should be evaluated by leadership to determine if any changes are needed.

- At Will vs Contract Language
- Job Description Appearance & Formatting
- Team Handbook: Policy Adjustments or Re-writes
- Separation / Termination Processes

1 of 21 areas received RED (Out of compliance and liability is present if not fixed or adjusted)

- I-9 Forms and Maintenance

Audit Recommendations

As a result of the Human Resource Audit findings, the following recommendations are being made.

Recommendations:

1. Within the Team Handbook eliminate all language that could be construed as contractual vs. at-will. Language such as “must” “have to” or “required.”
2. One (1) position, based on the job description provided, should be reviewed and possibly reclassified from exempt to nonexempt.
3. Continue to make the update of the Team Handbook and Standards of Conduct an annual process to ensure to reflect all suggested changes, revisions and new policies. Once completed, provide each employee the updates, by policy, to insert in their booklets.
4. Two I-9s still need correcting and one was missing the completion of the Certification section of the form. When correcting an I-9, follow the attached directions provided by the US Citizen and Immigration Services (USCIS).
5. Continue to create the HR SOPs (Standard Operating Procedures aka Processes for the core HR areas; Selection, Hiring, Terminating, and Workplace Injuries).
6. For consistency and credibility, create a single page New Hire Worksheet and a Termination Worksheet (similar to the New Hire Worksheet) to ensure the consistency and credibility when releasing a person from employment.
7. Because of the current practices in place, we continue to make the recommendation that an HR audit take place every two (2) years. Additionally, the HR Coordinator is encouraged to continue to work with HR professional/consultant for any major labor law changes that would need to be implemented.



Summary Overall, the results of both the Engagement Survey and Audit processes continue to demonstrate the outstanding health of the people and culture philosophies, practices and results of the MCCVB. In addition, the continued strength in year-to-year results indicates a dedicated leadership team who puts people at the forefront of its decisions and activities while managing risk and liability with relevant and active policies and practices. We encourage the senior leadership team to continue with the exceptional work which is clearly evident in our findings.

We look forward to our debrief meeting with the MCCVB Leadership in the coming weeks. Should any questions or clarification be needed, please do not hesitate to let us know.

Thank you for the opportunity to partner with your passionate and dedicated leadership team on this project.

All the best,

A handwritten signature in black ink, appearing to read "Chris Ihrig", written over a circular scribble.

Chris Ihrig, Fired-Up! CEO