

**Katie Smigiel, CU\*Answers**  
6000 28<sup>th</sup> Street SE  
Grand Rapids, MI 49546

*Phone:* (616) 285-5711 x214  
*Fax:* (616) 285-1561  
*E-mail:* ksmigiel@cuanswers.com

# **PROPOSAL FOR HUMAN RESOURCE SUPPORT**

---

*CU\*NorthWest*

# CU\*NorthWest

## *Proposal for Human Resource Services*

### **SUMMARY**

CU\*Answers, Inc. is proposing the utilization of our Organizational Resource Development team to assist in supporting Human Resource and Education functions within CU\*NorthWest.

This proposal outlines different areas of service that CU\*NorthWest might be interested in outsourcing. Some of the services will be provided in an ongoing, as needed, capacity falling under a general monthly retainer fee. Other Services will be provided as a la carte services with specific engagements and specific fees. CU\*Answers proposal for providing such services is outlined below.

### **INDEX OF SERVICES**

#### A La Carte Services

##### **< STRATEGIC BUSINESS PLANNING**

Work with the Executive Management team in areas of Human Resource, Education and Quality Assurance. CU\*Answers can provide consultative services and be a strategic planning resource in each of these three areas to assist CU\*NorthWest in planning for future growth not only in size but in depth. This would be accomplished through scheduled planning meetings involving the executive management team and members of CU\*Answers' O.R.D. team on an ongoing regular basis to be chosen by the client (i.e. quarterly, semi-annually, annually, etc.).

Cost:	Remote Planning Meetings	\$ /hour
	Planning Meetings Onsite in WA	\$ /hour plus T & E

##### **< POLICIES AND PROCEDURES\***

Develop, apply, and evaluate all policies and procedures that comply with state and federal guidelines. Ensure the human resource policy manual is up to date. We will provide an initial evaluation of all policies and procedures with the current HR representative at CU\*NorthWest and develop a set of policies and procedures to be used by CU\*NorthWest including a policy manual. These policies would be reviewed and updated on an annual basis. Any mid-year changes to the policies and procedures that are identified as necessary due to new regulation will be presented at the time the necessity is identified.

Cost:	Initial Evaluation and Development	\$
	Annual Review	\$
	Mid-Year Changes	\$ / hour

\*CU\*Answers' employees do not provide legal advice. All Policies and Procedures should undergo a legal review. CU\*NorthWest will be responsible for electing the legal advisor and pay for all fees associated with the legal review.

##### **< ESTABLISH RECRUITING AND HIRING STANDARDS**

Through an initial engagement we will establish a set of standards (SOP) according to best practices in the process of recruiting and hiring new personnel. We will outline a workflow for the process, create a basic policy for posting open positions, create a set of legal and standard interview tactics, provide tips on candidate selection and outline the process of pre-employment screening. We would

also be available to provide ongoing support and consultation for this process as outlined in the *Monthly Services* section.

Cost: One-time Set Up Fee \$

⟨ **DEVELOP A NEW EMPLOYEE ON-BOARDING PROCESS**

This engagement would begin with an evaluation of the process(es) currently in place for on-boarding new employees. We would then establish a standard process for on-boarding all new employees across the organization from the day they accept the position to their 90 day evaluation. We would also be available to provide ongoing support and consultation for this process as outlined in the *Monthly Services* section.

Cost: One-time Set Up Fee \$

⟨ **EMPLOYEE PARTICIPATION PROGRAM (EPP)**

Through this engagement we will assist the manager of Client Services in the creation of training and development programs, through the EPP, that meets the needs of the staff and the management team while also meeting the objectives of the organization. We would create the catalog, line up relevant subjects and classes, and if necessary assist in performing training.

Cost: Annual Planning and Catalog Completion \$ / hour  
Training via Webex \$ / hour  
Training Onsite in WA \$ / hour + T & E

⟨ **EMPLOYEE ANNUAL PLANNING (EAP)**

The initial engagement will begin with the creation of an Employee Annual Planning (EAP) Process that fits the objective of the organization. We would first analyze the culture of the organization and establish if an Employee Annual Planning structure that would be appropriate and determine the employee motivation that would be used in driving the incentive. When the program is approved, we will provide training for the Management Team explaining the new program and any new forms they will need to use.

On an annual basis, we will provide reminders to the management team about deadlines, be available to answer questions about the process and review completed forms before they are presented to the employee.

Cost: One-time Set Up Fee \$  
Annual Support and Consultation \$ / year

## Continual Month-to-Month Services

⟨ **RECRUITING AND HIRING PROCESS**

After the initial engagement, which is outlined in the *A La Carte Services* section, we will provide ongoing support and consultation to the Leadership team of CU\*NorthWest in all matters of recruiting and hiring. This support would be supplied mainly through email and phone communications when members of the leadership team have questions regarding the process or best practices of recruiting and hiring and also to discuss specific situations or scenarios for which they would like consultation.

< **NEW EMPLOYEE ON-BOARDING PROCESS**

After the development of the new employee on-boarding process, which is outlined in the *A La Carte Services* section, we will provide ongoing support to the Leadership team of CU\*NorthWest in all matters of new employees and on-boarding. This support would be supplied mainly through email and phone communications. This may include assistance in identifying the need for and reviewing developed training guidebooks specific to each department or responsibility.

< **EMPLOYEE RELATIONS**

We would provide CU\*NorthWest with coaching for the management team in clarification and application of organizational policies. We would also assist in addressing any potential issues that arise, and provide coaching support for managers with regards to employee relations. This support would be supplied mainly through email and phone communications.

< **EVALUATE DEPARTMENTAL PERFORMANCE AND MAKE RECOMMENDATIONS**

On a continuing basis we will evaluate reports and results in each department, as determined by the CEO, in relation to established goals for that department. If necessary we will report to the CEO any recommendations we may have to evoke improvements in efficiency as well as in services performed.

**Total Cost:      Monthly Fee      \$**

**Proposal Summary**

<u><i>A la Carte Services</i></u>	
Strategic Business Planning	
Remote Planning Meetings	\$ /hour
Planning Meetings Onsite in Washington	\$ /hour + T & E
Policies and Procedures	
Initial Evaluation and Development	\$
Annual Review	\$
Mid-Year Changes	\$ /hour
Establish Recruiting and Hiring Standards	
One-time Set Up Fee	\$
Employee Participation Program (EPP)	
Annual Planning and Catalog Completion	\$ /hour
Training via Webex	\$ /hour
Training Onsite in Washington	\$ /hour + T & E
Employee Annual Planning (EAP)	
One-time Set Up Fee	\$
Annual Support and Consultation	\$ /year
<u><i>Continual Month-to-Month Services</i></u>	
Monthly Fee	\$ /month
Recruiting and Hiring Process	
New Employee On-Boarding Process	
Employee Relations	
Evaluate Departmental Performance	