Ope! What did I do now? Case Studies in the Relationship between the Laboratory and Human Resources

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After working as a hiring and training manager over 15 years for some of America's best-known brands, Miles went to Rose State College in 2010 for Medical Laboratory Technology. Since then, he has worked as a Medical Technologist for Diagnostic Laboratory of Oklahoma (DLO) at Integris Baptist Medical Center in Oklahoma City, Oklahoma for 9 years before being promoted to the role of Technical Staffing Specialist. Recently, he has also accepted the teaching roles as Clinical Adjunct Faculty at Rose State College and Phlebotomy Instructor at Oklahoma Christian University. Miles has taken great pride in the work he has done for the promotion of diversity and inclusion as a member of the DLO D&I Council, as Past-President of ASCLS-OK and currently as Secretary/Treasurer for the National ASCLS Board of Directors. He is married to Leon; a professional ballroom dancer and teacher who doesn't mind that Miles has no rhythm or balance. Together, they enjoy traveling to remote and random places in Europe.

About Me:

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Disclosure:

- My employer, Diagnostic Laboratory of Oklahoma (DLO) is a Joint Venture partially owned and operated by Quest Diagnostics. Quest Diagnostics offers a monetary bonus for recruitment. Only if an individual lists me by name in their application process do I receive any award.
- I am neither requesting to be listed as a recruiter, nor am I promoting employment with any specific company, including DLO/Quest Diagnostics
- All views and opinions expressed are that of the author and do not represent that of the author's employer(s) or any other associated organizations.
- All scenarios have been invented or altered significantly to protect the identity of individuals or organizations and do not involve any ongoing action. Any personal similarities to a case study are purely coincidental.

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Objectives:

- Review "real world" cases of Human Resources and Laboratory interactions and discuss outcomes.
- Examine pathways that HR can be a valuable asset to the Laboratory personnel.
- Discover methods in which the Laboratory can collaborate with HR to create a better workplace culture

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What do they do?

- Recruiting of new employees
  - Participate in the interview, offer, and hiring process
- Payroll and Benefits
  - Negotiate, track, and implement
  - Routine investigation and analysis
- Employee Relations
  - Policies
  - Career growth
  - Continuing education
  - Performance
  - Health and Wellness
- Training and Support
  - Orientation
- And More….

Understanding HR

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Who does it?

- Have at least a Bachelors degree in Human Resources, Business, or related field
- Certifications
  - HR Certification Institute (HRCI)
    - Human Resource Standards Institute (HRSI)
      - Certified Professional in Human Resources (PHR)
      - Senior Professional in Human Resources (SPHR)
    - Based on education level and experience

Understanding HR

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A good HR team…

- Represents both the employees and the company.
- Has open and honest conversations, even when difficult.
- Promotes education and understanding of why things are done the way they are.
- Participates in all levels and departments.
- Asks questions.

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Case Studies

And a few disclaimers…

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Case Study #1

You are short-staffed and needing to hire new employees ASAP. You have performed several interviews with applicants sent to you from HR and none of them are the right for the position. Some are not qualified, while others have "red flags" with experience or professionalism. Your staff is frustrated because they do not understand why you aren't hiring the people that HR is sending you. You are frustrated because the applicants that they are sending you are all wrong. Have you been in this position? What do you do?

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Case Study #1

- Schedule an appointment with your HR representative.
- Review the job posting to ensure the language in it matches the desired candidate you are seeking.
- Discuss what questions or conversations the HR team has with potential candidates
  - Discover what they have listed as required or preferred education and skills.
- Provide HR with a review of previous applicants with the "pros and cons" for each
- Offer for HR to come to the Laboratory to take a tour and meet some of your high performing employees.
- Ask a member of HR to sit in on your interviews

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Case Study #1

- Remember, that while the HR team works very hard to understand all parts of an operation, without firsthand knowledge most HR members are not familiar with the Laboratory and what it entails
- Provide HR a "cheat sheet" that can be easily referenced with most pertinent new hire requirements (ASCLS Body of Knowledge)
- Follow up with communication on future applicants to help focus on what you are seeking
- Remind your staff that all of you are working towards a common goal in hiring the best for your open position.

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Case Study #2

Your employee morale is at an all time low and everyone is burned out. Due to this, tensions are rising amongst the staff, and you are concerned that if something doesn't change soon, they will start turning in their notice to work elsewhere. You are all out of ideas and some of the more vocal employees have already threatened to leave if they see another piece of cold pizza. What now?

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Case Study #2

- Call HR and explain the situation
  - Asking for help is not the sign of weakness but the sign of a good leader
- Have HR conduct research on root causes specifically for your employees
  - Poll/Surveys/Conversations
- HR can help develop a plan for activities, action items, and/or change in processes to combat burnout

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Case Study #2

- HR routinely researches employee engagement ideas with a successful ROI and discovers way that can be implemented specifically for your Laboratory.
- HR can sometimes assist with submitting budget requests to Administration buttressed with their own metrics.
- While HR can assist and develop a plan, you will need to lead the execution of it

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Case Study #3

A member of staff informs you that others are complaining about a male employee of middle-eastern decent is treating females differently than their male counterparts. When you ask or more details, it is stated that he "treats everyone kindly and with respect when he speaks to them, but when he arrives at the beginning of his shift, the employee shakes hands with his male coworkers to greet them but recoils when female coworkers attempt to do the same." What would you do next? Would you confront the male employee first? Ask around if others observe the same behavior?

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Case Study #3

- Contact HR immediately
  - Discrimination
  - Harassment
- Set up a meeting with the employee and HR representative
  - Too many variables
  - Trained to ask questions and find solutions without being accusatory
- No other employees should be involved at this point

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Case Study #3

- At the meeting with HR, the employee explains that in his religion, he is not to have physical contact with members of the opposite gender that he is not related or married to. He further explains that this is not meant as a disrespectful practice, but to honor his religion. He is apologetic and wishes to make things right.
- Since it would not be appropriate to single out the employee's religion, he is asked to only greet all employees equally moving forward.
- An in-service with HR is planned with a refresher on DEIB including religious sensitivities and gender equality.

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Case Study #3

- In this scenario, a fairly simple solution was able to be reached, however there were several factors that could have presented conscious or unconscious bias and altered the outcome.
- HR employees are extensively trained and undergo ongoing education on DEIB.
- The HR team can not only assist in navigating issues in relation to DEIB but help prevent future issues that may arise
  - Gender Identity

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Case Study #4

Laboratory Management is noticing an increase in turnover and are asking questions. While investigating you notice that there is a trend of employees who have been there from 3-5 years are leaving at a greater rate than others. Pulling a few of the files, the reason most of them gave was for "other job opportunities." When you are having a conversation with an employee, they make the statement "well unless someone quits or dies, I'm never going to be promoted." What do you report back? Do you do anything more? Can this be fixed?

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Case Study #4

- Contact HR and look at your departments Career Progression guidelines.
  - MLT/MLS I, II, III, etc.
  - Group Lead, Key Operators, Sr. MLT/MLS
- Work with Leaders and HR to create a clear progression for high-performance employees
  - Including new roles
- Create a chart for all employees to better understand the opportunities available to them.
  - Education
  - Experience
  - Performance/Tasks

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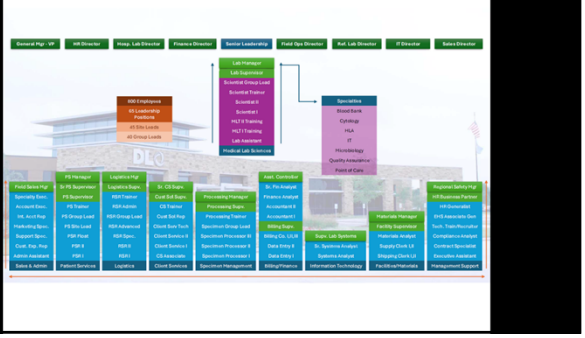

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Case Study #4

- HR can pull other departments and trends to find career pathways that can used in the laboratory
- HR can also review the job descriptions and tasks to better evaluate pay grades for new positions or tiers
  - More work= more pay
  - Not just a title
- While not a perfect solution, most employers complain that "if they only knew…" before a good employee leaves.
  - More frequent evaluations and/or feedback
  - Routinely and specifically ask about career goals

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Case Study #5

You receive a call from HR that a grievance has been filed against you. An employee who has made several mistakes and that you have been having ongoing coaching with has stated that you are singling them out/treating them differently than other employees and have been too harsh with them. What now?

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Case Study #5

- Schedule an in-person meeting with HR
  - Bring all documentation
- Discuss a plan on how to get back on track with this employee
- Work with HR to improve communication style in various scenarios
- Schedule a meeting with HR and the employee to discuss and implement goals
- Be prepared to answer questions in a nonconfrontational manner

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Case Study #5

- HR is asked regularly to mediate and provide conflict resolution
  - May pick sides only when necessary
- Questions
  - What is the desired results?
  - Is it the person or the process?
- If you didn't document it…. It didn't happen
- Do not discuss other employees, even if it helps your case
- Always have a development plan with well understood metrics
  - "~~Be better~~"

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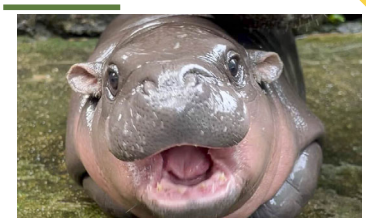
Moo Deng Break…



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Case Study #6

You have an employee who typically has been great but is now showing signs that something is wrong. The employee has been late and called in more frequently to where they are low on their PTO balance. You have also noticed some small mistakes and difference in communication. While not rising to the level of requiring write-ups, if something doesn't change soon, you may have no choice but to begin the performance management process. Any conversation with the employee has resulted in acknowledgement and apologies for the issues, but no change. If the employee won't share with you what's wrong, what can you do?

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Case Study #6

- Invite HR to the laboratory to have a conversation with the employee
  - Making clear that the employee isn't in trouble but there is concern
- HR has a plethora of resources internal and external
  - Mental Health
  - Leave of Absence/FMLA
  - Financial Assistance
- In this scenario, the employee was struggling with mental health while an elderly parent was living with them and was ill

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Case Study #6

- While HR is not a licensed mental health provider, they are trained on how to approach and provide access to those resources
- Sometimes it can be embarrassing to tell someone you work for/with that you are struggling
  - Having a connected but "outside" person can help such as HR
- Can provide training and resources on how to detect mental health issues for leaders and coworkers
- Always contact HR if you notice a sudden change in behavior

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Case Study #7

Employee A approaches you about Employee B. They state that Employee B has strong and unpleasant body odor, and it is becoming difficult to work around them. How would you address this?

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Case Study #7

- Contact HR to make them aware
  - In this instance, they may ask you to investigate and have a conversation without anyone else to prevent further possible embarrassment
  - Can advise and provide communication techniques
- Investigate yourself firsthand, not bringing this to the attention of other employees
- If you do not detect the odor Employee A reported
  - May need to investigate why the accusation was made
  - Follow-up and bring in HR

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Case Study #7

- If the odor is detected with Employee B
  - Have a private conversation to address it
  - Be specific only from your observation and perspective
  - Be compassionate
  - There could be a medical reason but do not "diagnose"
    - Contact HR for reasonable medical accommodations
- Follow up with HR and keep them updated with developments

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Case Study #8

You have a new MLS who stated on their resume and in their interview that they were very proficient in Hematology. While performing their initial competencies, you discover that the new MLS has been outside the TEa for identifying Monocytes and Lymphocytes on a Manual Differential. You are starting to believe that they lied on their resume or exaggerated their experience. Do you let them go?

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Case Study #8

- HR can advise on labor laws in your location
- Can also have a meeting with employee to explain expectations and timelines to be met during training.
  - If not met by established timeline, begin performance management
- HR can also provide advice on how to ask interview questions to establish proficiency level of skills
  - Are you permitted to give a skills test?
    - Get HR to help develop

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Case Study #8

- While frustrating, the new MLS may not have been intentionally misleading
  - Benefit of the doubt
- Additional action would be on a case-by case scenario
- All training expectations should be presented with a proposed timeline
  - Can be adjusted based on circumstances

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Case Study #9

An employee approaches you and states that they feel sexually harassed by another employee and its leading to a hostile workplace. They are even hesitant to give you the name of the coworker and asks that you do not say or do anything and for this to remain confidential. Do you honor their wishes?

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Case Study #9

- REPORT THIS TO HR IMMEDIATELY
  - Duty to Report
  - Bound legally
- Anonymity will be exercised to the fullest extent possible
- An investigation will take place to determine any wrongdoing or extent
- Follow any HR policy or advisement on how to proceed

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Case Study #9

- Always believe an accuser
  - Not your role at that time to determine innocence or guilt
- Duty to Report
  - What if this was a threat of violence?
  - Compliance?
- You can be held personally liable for failure to report even if asked not to
- Investigation can uncover patterns or behaviors beyond the initial complaint

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Case Study #10

Your long-term employees are complaining and getting frustrated that new MLT/MLS employees are being brought in at higher rates of pay. Annual increases have not kept up with cost-of living however, your labor budget doesn't allow you to give across the board raises to these employees. How do you balance the needs of your current employees but still be competitive with the new hire market?

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Case Study #10

- HR can help in several ways:
  - Salary analysis for the specific market
  - Pay Compression Study
  - Provide data to Finance and help receive budget increase
- Have conversations with staff about pay guidelines and solutions to explore
- Review merit increase standards

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Case Study #10

- Pay Compression Study
  - Analyze current employees' salaries
  - Review inconsistent practices
  - Provide solutions
- Have a conversation with employees
  - Nobody loses by new hire salaries going up
  - Nobody wins in a bidding war either

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What do all these case studies have in common?

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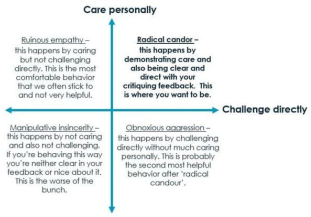
- Practice of being direct and honest while still showing compassion and care for others
- Popularized by Kim Scott
- Focuses on open communication, honesty, and mutual respect



Radical Candor

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Not to be confused with the "compliment sandwich"

- Compliment
- Criticism or correction
- Compliment

- Creates a 💩 sandwich
- Becomes a Pavlovian response to both compliments and criticism.
- Dilutes the message given

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Remember:

- HR is not the enemy
- If in doubt, reach out!
- Most HR teams do not know a lot about the laboratory, but are always willing to learn
- HR can be a good conduit to other departments
- Communicate Compassionately

Conclusion

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Thank you

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