

Organizational Development Portfolio

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1. New Hope Carolinas, January 2010 to May 2016

New Hope Carolinas was a lock-down facility for troubled children. It offered therapeutic services with the intent of rehabilitation for youth with behavioral issues.

There were 400 employees in a single facility and the hours of operation were 24 hours a day, 7 days a week. Workers often dealt with aggressive clients and frustrated family members. Administration was subject to governing bodies such as local law enforcement, HIPAA, managed care organizations, and the Joint Commission.

My position was Lead Advocate/Quality and Performance Specialist. It was my role to oversee the grievance/allegation process and participate in all activities which helped the staff do their jobs better, such as training/workshops, disciplinary consulting, employee engagement initiatives, process development, assessment tools, and change management.

1.1. Grievance Process

The grievance process revolved around letting the clients report if the employees had harmed them in some way. It could be a minor complaint such as if an employee allegedly made an unprofessional comment to the client, or it could be an allegation of abuse or neglect such as if an employee inappropriately touched a client or refused to provide them with a meal.

I revamped this system so as to provide data in order to help the Executive Leadership team understand what was happening in each unit and each shift. The revamp included updated input forms and multiple education with clients and employees about how to use it and how the data is used. With each complaint, I facilitated the investigation process by either delegating the investigation to the appropriate team, or I was directly involved in high-level allegations as the lead investigator.

I aggregated the data for each client and employee to show trends in complaints and allegations. We could see how many complaints were made by each client, how many were made against each employee, and if the allegation was substantiated, unsubstantiated, or could not be proven either way. With the substantiated ones, it was broken down whether the employee acted with willfully malicious intent or if their behavior was not malicious, but rather the result of other factors such as a misunderstanding, lack of knowledge, or professional development barrier.

Employees who acted with substantiated malicious intent were given disciplinary measures, whereas those with substantiated non-malicious intent were given support, education, and only given disciplinary measures when appropriate. Clients who made false allegations were educated about the nature of the interaction – they may have misunderstood what the employee was therapeutically attempting to achieve (such as their trauma causing them to perceive appropriate boundary-setting as a threat) or they may have made a false allegation as a means to communicate other problems (such as a client who was unable to access adequate clothing through the clothing donation closet – a chain of events caused her to complain she was being neglected by not receiving adequate meals, which lead to uncovering her true problem).

With this data, I was able to show the patterns in complaints from clients and against employees, which allowed all management teams to ascertain what kind of scrutiny or attention needed to be given to different individuals. With this system in place, I was able to show that the nature of most complaints revolved around communication; even if something was done or communicated correctly, the clients reacted poorly when the communication had harsh tones or harsh gestures – which was concurrent with how the clients' flight-or-flight response was highly sensitive due to trauma and/or stress. Management was assigned to train employees on how not to trigger client stress responses through communications.

This system was also invaluable in protecting employees who attempted to do well while weeding out the ones who were a toxic element with vulnerable patients. We were also able to show local law enforcement these results when concerned family members contacted them.

I concurrently worked with HR on using this feedback system in the talent management process.

1.2. Employee Professional Development

I developed and/or provided training and workshops for employees. Additionally, I would frequently coach employees and managers on an individual basis in overcoming their professional barriers.

Trainings included:

- Cultural Sensitivity and Diversity
- Patient Rights and Responsibilities
- Motivational Interviewing (how to respond to patients in a way that helps them figure out what they want, rather than to escalate their frustration)
- Transgender and Gender Non-Conforming Policy Guidance
- Best Care Practices
- Child and Family Development
- Common Mental Health Diagnoses

1.3. Diversity and Inclusion SME

I chaired the Cultural Competence Committee and was a member of the local Mecklenburg County Cultural Competence Advisory Council. Related trainings are listed in Section 1.2 Employee Professional Development, and related assessments are in Section 1.5 Assessment Development and Use. My team's planned and facilitated events included coordination with Winthrop's student-run GLOBAL Presentation: *What it's like to be an LGBT Youth*. I often invited members of the community to be a part of the committee, including representatives from NAMI, law enforcement, Winthrop professors, and minority population members.

1.4. Program Development and Evaluation

Multiple programs were developed and evaluated in order to improve systematic functioning for employees and strategic, operational, and tactical processes. These included:

- Chairing the Patient Advisory Board: *Patient Empowerment through Voice and Action*.

- Developing Community Groups on each milieu to enhance company culture and unit cohesion while empowering the patients.
- Developing Activity Clubs to bring patients and employees together through shared hobbies and mentorship opportunities.
- Member of Employee Retention Task Team lead by HR
- Lead the Social Justice Program by applying knowledge of patient and employee rights into practical and actionable goals.
- Lead the local Building Bridges Initiative and coordinated with other BBI representatives on state and national levels. Worked to decrease institutionalization with our patients and increase community connectedness.

1.5. Assessment Development and Use

I designed and/or used these assessments to measure the effectiveness of programs and systems:

- Designed Grievance Tracking
- Administered Multicultural Self-Assessment
- Designed Motivational Interviewing Fidelity assessment; To be scored by patient to communicate perception of care. Adopted by other facilities.
- Administered Self-Assessment Checklist for Personnel Providing Services and Supports to LGBTQ Youth and Their Families.
- Member of Pre-Screening Task Team lead by HR: Assessment Development for Screening Potential Employees.

1.6. My Professional Development

- Trauma-Focused Cognitive-Behavioral Therapy. Medical University of South Carolina.
- Cultural Differences and Treatment. Southern Regional Area Health Education Center.
- How to Effectively Coach Employee Performance. Deer Oaks.
- Employee Internal Investigations. National Business Institute.
- Strategies to Maximize Employee Productivity. Deer Oaks.
- Customer Service Training. Provided by nationally recognized customer service organization.
- Gang Violence Training. Investigator Kelvin Griffith from the Richland County Sherriff's Department.
- Best Care for Victims of Sexual Trafficking. Deepa Patel.
- Selecting the Best: Effective Hiring Techniques. Deer Oaks.
- Creating a Culture of Improved Employee Engagement. Deer Oaks.
- Building Bridges Initiative. American Training/ Building Bridges.

2. Thompson Child and Family Focus, May 2016 to October 2018

Thompson CFF is a non-profit organization meant to aid children and families. At the time of my departure, their 10 Lines of Business through 4 facilities were geared at providing therapeutic and educational services to the community.

2.1. Scorecard Development

I lead the development of the scorecards which were reported to program managers each month and upon request. The scorecards measured KPIs, quality measures, and employee metrics.

This development involved revamping the input systems in order to obtain accurate and useable data. I collected, aggregated, and analyzed the data, then reported the results through meaningful communication channels. I co-facilitated the monthly meetings with the VP of Quality and Performance Improvement, in which we discussed improvement plans and opportunities with each manager.

2.2. Employee Professional Development

I offered and developed training, as well as provided coaching at the individual level:

- Became a certified trainer for the *CARE System of residential therapeutic delivery* from Cornell University.
- Developed and taught the Importance of Accurate Data Collection training.
- Served as consultant to interim CEO Bruce LaRowe on leadership development and employee change management tactics.

2.3. Diversity & Inclusion SME

Continued as chair for the Cultural Competence / Diversity & Inclusion committee, as well as the continued liaison for the Mecklenburg County Cultural Competence Advisory Council.

I lead a team which researched the perceived D&I needs in the organization; it was determined that we needed a boost to Culturally Effective Communication. My team and I planned a lunch event based on the World Café model and carefully crafted 3 questions which would elicit self-awareness and meaningful communication while improving employees' professional relationships. We measured after the intervention to determine there was perceived improvement in Culturally Effective Communication.

2.4. Program Development and Evaluation

I would monitor the data for signs of problems or issues. After reviewing any red flags with my team, I would engage in evaluation to understand the root cause of the problem. This included:

- Performing research, employee interviews, and focus groups to understand employee experience.
- Offering a description of found patterns and process barriers
- Offering recommendations for how to rectify the problem(s) found.

I facilitated the evaluation of the new employee onboarding measuring process. This process monitored the new employee's experience to ensure they received the appropriate support and that their needs were met during their initial work tenure.

Also wrote winning grant submission for Sisters of Mercy in funding Family Education programs.

2.5. Assessment Development and Use

These are the assessments used:

- Used the FMEA model (Failure Mode Effects Analysis) to uncover root problems in a process.
- Used the Thomas Kilmann Conflict Mode Instrument
- Used the Strengths and Difficulties Questionnaire
- Developed the Thompson Outcomes Tool (Developed logic model and assessment)
- Used the Protective Factors Survey
- Developed multiple surveys around customer satisfaction and employee development needs

2.6. My Professional Development

Attended these trainings:

- Racial Equity Training. Race Matters for Juvenile Justice sponsoring Racial Equity Institute
- Children and Relational Experiences. Cornell University's CARE curriculum

3. Think2Perform Research Institute – Research Fellowship, December 2016 to October 2018

Performed qualitative phenomenological heuristic research on The Experience of Meaning in Work for Millennials. Presented findings to T2PRI executive leadership team and worked with editor to present findings in the T2PRI business journal.

The findings inspired my book, A Worker's Worth: The Connection Between Human Value and Employee Performance.

4. TIAA (Formerly TIAA-CREF), October 2018 to December 2018

TIAA was a large financial institute which offered insurance products to teachers and government employees.

4.1. Job Description Development

Performed job description development for universal use across all departments. Coordinated with multiple HR personnel and departments in order to align requirements with expectations.

4.2. Employee Professional Development

Proposed leadership training with the understanding that employees would need to move from Waterfall thinking to Agile thinking.

4.3. Program Development and Evaluation

Worked with team to measure and develop competencies for job descriptions.

5. Engagement Techniques Consulting, January 2019 to Present

ETC offers professional development, psychometric assessment, coaching, and research and evaluation for small to medium sized companies. Projects have included:

- Alternative Healthcare Business. Worked with owner to determine how to measure KPIs and customer satisfaction. Assisted with grant writing.
- Mortgage Products Business. Manager needed to rebuild his team from 2 to 10, so we discussed how growing a team that is purpose-driven and principled would provide them with a sustainable business model and positive customer experiences. Provided hiring assessments, wrote a charter based on manager's goals, and provided training for his team revolving around ethics, personal responsibility, team-building, and personal empowerment.
- Manufacturing Plant. Employees kept leaving after 2-3 paychecks. Managers thought they were leaving because employees felt "paycheck rich" but the reality was that managers treated employees poorly. I interviewed employees about their perception of work and how they wanted to be treated, then relayed the information to leadership with recommendations for how to communicate in ways to which employees would respond positively.
- Electronics Manufacturing and Service Company. Communication break-downs made it difficult for workers to do the jobs as well as possible. Implementing a new communication system helped workers understand how tasks were expected to be done, allowed them to choose the ones they were strongest at while practicing and learning other tasks, and helped managers keep track of what had been completed.
- Dentist. Struggled with managing millennial employees. Coached him on how to understand and respond to their needs while balancing support with expectations.
- Architect. Had 3 employees who plateaued in their professional development. Coached him on how to use their strengths to inspire them to grow. Worked on a plan to rearrange their schedules and provide them with a way to grow. He last reported that 2 out of 3 responded positively.
- Software Programmer. Worked for a company who routinely undermined his department and left him feeling overwhelmed and lacking in morale. Coached him on how to cope with

his challenges and work towards career choices that would drive him towards a sense of fulfillment.

- Cable Installation Company. A worker who had been there for 20+ years had personality problems and impacted the morale of the rest of the company, but the CEO did not wish to terminate him. Interviewed all employees to learn about how the recent change in management dynamics had caused a flare-up. Held group meeting to educate them on their current dynamics and how to improve relationships or reframe and respond to problematic encounters.