

OneSource Consulting Client: FinServ Global

Meeting: HR Policy Updates for 2025

Date: July 20, 2024

Attendees: Rachel Goldman (HR Director), Michael Chang (Legal Counsel), Olivia Martinez (Employee Relations Manager), Daniel Kim (Diversity & Inclusion Lead)

1. Remote Work Policy

- Transition to permanent hybrid model: 2 days in-office, 3 days remote
- Update equipment allowance for home office setup

2. Parental Leave

- Increase paid parental leave to 16 weeks for all employees
- Introduce 'gradual return to work' program

3. Mental Health Initiatives

- Expand Employee Assistance Program (EAP) to include virtual therapy sessions
- Implement company-wide mental health days (4 per year)

4. Diversity, Equity, and Inclusion (DEI)

- Mandatory unconscious bias training for all employees
- Introduce mentorship program for underrepresented groups

5. Performance Review Process

- Shift to quarterly check-ins instead of annual reviews
- Implement 360-degree feedback system

6. Learning and Development

- Increase L&D budget by 20% for 2025
- Partner with online learning platforms for expanded course offerings

Action Items:

1. Rachel to draft updated remote work policy document by 8/1
2. Michael to review legal implications of new parental leave policy by 7/30
3. Olivia to research and propose EAP providers for virtual therapy by 8/10
4. Daniel to outline unconscious bias training curriculum by 8/15
5. Rachel to create communication plan for policy updates by 8/5
6. All to review and provide feedback on new performance review process by 8/1

Next meeting scheduled for August 17, 2024