

- You are listening to HR Mixtape, your podcast with the perfect mix of practical advice, thought provoking interviews and stories that just hit different so that work doesn't have to feel, well, like work. Now, your host, Shari Simpson.

- Joining me today is Kyra Matkovich, principal human resource business partner at Exact Sciences. Kyra has over 25 years of business and HR experience in multiple industries, including biotech, healthcare, insurance, nonprofit, and government. Her passion is people and creating meaningful work experiences by helping organizations connect HR initiatives with business strategy, with a special emphasis on fun, collaboration and leadership development. Kyra, thank you so much for jumping on the podcast with me today.

- I am excited to be here. I know we've been talking about this for a while and so I'm raring to go.

- So this is one of our fun episodes where I scour the internet for some great juicy HR questions and we tackle them together. So I'm so glad you were able to jump on this one with me. I think we're gonna have a lot of fun.

- Yeah, I'm looking forward to it. I always love these sort of juicy HR questions and they are fun to wrestle with.

- Yep, all right, so we'll start with this one. We have an employee who claims head of household and single. She also listed her emergency contact as her spouse. Is this something I can ask her about to see if there's been a mistake?

- So I have questions as a result of the question. I mean, if this was happening in my organization for example, I think I would first ask when we say claiming head of household and single, I'm assuming they're talking about the W-4. And you know, for me personally, I don't know that it would raise a red flag in any way just because it has more to do with how withholdings are being handled. And so if you submit a W-4, you can mark it as single, it takes out higher taxes. Really where the rubber meets the road is how is this person submitting their tax return which we would have no say, no state over anything, any opinion. I mean, at the end of the day, that's between this employee and the IRS. I think I might pull the employee aside just to ask, maybe it was an oversight, maybe it was I don't know, but I would just bring it to their attention like, hey, I noticed that you submitted your W-4, you marked head of household and single, I noticed on your emergency contact that you have a spouse. And it's really none of my business I don't need to dive into it I just wanted to make sure that you were aware of that if you wanted to update your W-4 for example, or something like that, like maybe she just recently got married, I don't know. I think that's kind of where I would leave it though, because unless we're starting to get into details regarding

benefits and maybe claiming somebody as a spouse and they don't meet the criteria either as a spouse or a significant other or a partner, 'cause I know many states have specific laws that are related to that or how the benefits are actually written in the plan. Unless we have those types of questions, I don't know that I would dive into it any deeper than that.

- Yeah, I probably wouldn't even go that step that you went. I think I'm more apt to be like, taxes. That's for you to handle. And I might apt myself to send a reminder out towards the end of the year like, hey, make sure your taxes are correct. 'Cause you're right, like we're not accountable for that and we definitely do not wanna be giving tax advice.

- Exactly, and I would be very clear on that. Because I have had employees where they did get married and they hadn't thought about updating their W-4. And so it's really more about bringing it to their attention, I don't care what they do with it. I mean, I also know that I'm sure luckily I'm in an organization I don't have to deal with this at all, but I know many of our colleagues that do and that is coming towards the end of the year when people start, well, you didn't take out enough taxes and all these things. And it's like, well, actually, that's on you, that's not for us to determine. So that's on your W-4 and whatever it is that you turn into us that is how we withhold, period.

- Absolutely, all right, here's our next one.

- Okay.

- With a Thanksgiving potluck at work, would you word it as that or would you rename it autumn potluck, trying to be mindful of all the employees wondering what others do?

- Yeah, I think that's totally fair. I try to be thoughtful around when it comes to holidays. I think it in the US, that's tough. I'd have to think about that. I think if there's a committee, that's a question that I would pose and just say, hey, maybe this is something that we can survey our employees on and how they feel about it. I'm just thinking if this is a US-based company and Thanksgiving is a US holiday, I think I'm a little less concerned about it but I think it's fair. 'Cause maybe, I mean, just thinking about, not everybody celebrates that holiday for a number of reasons. Whether they just don't celebrate holidays at all for religious purposes, or they don't acknowledge it for other reasons. Indigenous employees, for example, may not acknowledge Thanksgiving as a holiday. I think that's totally fair. I mean, I would try to provide a much larger net of inclusiveness and maybe call it an autumn potluck or something along those lines I think.

- Yeah, I think the more you can pull out some of those traditional names, you could just say seasonal or you could maybe link it to one of your values at your organization. There's definitely ways around using that particular word so I totally agree.

- Yeah, exactly. And I'll just add like in my organization we do potlucks quite a bit, and we very rarely tie it to a holiday. It might be around a holiday but we don't call it a holiday anything. And so it's really more our monthly potluck or we do one in October and we just call it the October potluck.

- Love that. All right, this one's a little bit longer so our listeners will have to bear with me as I read through it. Anonymous, so company and individuals are not identifiable to protect confidentiality. Seeking advice on a situation. We have a new C-suite leader, male, a female direct report admin assistant has come to me with some complaints, concerns about how he addresses her. The feedback is that he's often very condescending. I've listened and provided some coaching to the employee. Some of the things reported initially could have just been taken out of context. Today, the employee reported that the leader asked her opinion on a project and when she elaborated, he interrupted to say, "Just stop talking. You have a lot of very disorganized thoughts and just because you think them doesn't mean they should come out of your mouth." In addition, he made an inappropriate comment alluding to his when she was talking about emails in his junk folder she did not address with him but the comment made her uncomfortable for obvious reasons. Here's where I'm sneaking advice. Obviously there needs to be further conversations on this and follow up with this leader. If true the behavior is unacceptable, I'm just getting to know this leader and I am his HR business partner. Who in the organization is best to have the conversation with the leader regarding the situation? One, me, his HR VP, I'm at a director level, two, the VP of HR keeping it a C-suite conversation. Initially, I was ready to deal with this myself but I'm second guessing and considering suggesting our VP should handle it instead. VP has already been appraised of the situation. Does this make a difference for which one of us handles this as long as the proper process is followed? Thoughts?

- Okay, so this is juicy. There are a number of things that stand out to me. I mean, of course, I'm gonna zero in on the inappropriate comment related to the junk folder. I feel like there's a number of things that are happening. That one though is starting to kind of raise the red flags on sexual harassment kind of claims. And so that's definitely something that I would probably want to investigate. And then he just sounds like a gem of a leader, definitely somebody we'd probably all wanna work for being facetious, of course. I think there's a number of coaching issues here. So just speaking from my perspective, if this was somebody that I was supporting as their HR business partner, regardless of my level, that's a relationship that I

feel like I need to establish. And hopefully at this point in time, it sounds like this is kind of a new C-suite leader, how long have they been with the organization? So that was the part that maybe that relationship hasn't been established yet. I would also be curious who they are reporting to. I'm gonna make the assumption that maybe directly to the CEO, perhaps, in which case then the VP of HR would be typically the one that's supporting that individual. And so, if it were me, I would probably broach the topic with the leader and just let them know, here's what I'm hearing. And just wanna reiterate what our expectations are in the organization, appropriate types of communications, talk about our leadership behaviors and expectations. That particular comment, it was raised totally inappropriate for these reasons. Document that conversation. And then I would probably loop back, it sounds like VP of HR is already aware, but then also loop in their direct supervisor, assuming the CEO, just making them aware of the situation and then of course documenting all of this. Because then if it happens again, then we've got a different conversation. It just sounds to me so like I said, there's a couple of different issues here. One is the inappropriate comment and then the other one is just some really questionable leadership capabilities and communication that I would wanna coach on. And then it's just really is this the type of behavior that's condoned within this organization? How are they actually gonna hold this person accountable? Is this behavior that is typically swept under the rug? Hopefully not, but I mean, at the end of the day, HR, we're not always the decision maker, we're an advisor. And depending on how the CEO wants to proceed, that's kind of sometimes where we're stuck, document the crap out of it though.

- For sure. And I liked your comment about, is this the kind of organization, do they allow this behavior? You know, I think sometimes it's a really great tool to go back to your values and say like, one of the things that we value in our organization is, maybe it's growth, right? And so if you have somebody that's maybe younger and the ideas they're bringing to you aren't as developed as somebody who's more senior, there's a way to have that conversation then obviously the way this leader approached that. So I think you're absolutely right about that, how you kind of tackle this. And this might be to the point where you are talking termination potentially depending upon-

- It's quite possible.

- Where the organization is and how the CEO thinks about some things. I've been in organizations where behavior like this would be a last and final conversation and just be like, this is not how we think.

- That's exactly right. And again, if this is stuff that is just sort of coming up and we haven't addressed it yet, then I'm all about like, hey, let's give somebody a chance to correct their behavior. And I mean, I don't know that I see anything as it's written here egregious. If it is, for instance, if we did launch an investigation specifically

around that comment, the inappropriate comment, I think I would wanna explore that a little bit more. Like what exactly was that comment and kind of provide the context of that. Could that be a terminating factor perhaps, but I would wanna have a pretty serious conversation with this individual say, in this organization this is completely unacceptable and it's not aligned with our values. You are teetering on illegal behavior and that it will not be tolerated. And then leave it at that. And then if they choose, I mean, hopefully they would lean into that feedback and change their behavior. But of course, if they didn't then I don't know that I would wait on any termination like they're gone, we're not tolerating that.

- All right, next one is up. I have an employee who has a drinking problem. This is not the first time she's called out of work for multiple days while on a bender. The last time I walked her through getting counseling, I'm not sure what else to do to help her. I hate having to terminate her due to attendance because it'll probably only make her worse. What would you all do?

- Oh, man, this is hard. So, unfortunately, I've had similar situations. The reality is people are not going to get help unless they want it. I think if I had already provided some information, first of all, I think are we making an assumption about a drinking problem? I'm just curious about how we're gathering this information. How do we know it's a drinking problem? How do we know it's not something else going on? Again, with the employees that I support, I have a pretty tight relationship with. And in the case that I'm thinking of, this individual came to me directly saying, I've got a problem. Now, if they hadn't shared that and we were dealing with attendance, I mean, obviously I would come alongside that employee and say, okay, we're seeing a pattern, here are some of our concerns. I do wanna share with you some different resources that might be available, whether it's through EAP, certainly we've got leaves and accommodations if you need to pursue some support in terms of rehab or something along those lines. But at the end of the day, if they are choosing not to do those things and they're not following up and they continue to have attendance issues, then I would hold them accountable for the attendance issue. To me, the reason why they're not there is sort of irrelevant. But again, it's a really hard thing 'cause obviously you care about your employees, you wanna walk alongside them, you wanna understand, hey, what's going on? Is there something that we can help you with? Are there stressors that we can maybe help you find other resources for? Are there other things that are going on at home that may be triggering for some of these things? And maybe we can help them find a better schedule that works for them. Like maybe they can come in a little bit later, whatever, I don't know, different types of accommodations. But again, at the end of the day, I think these are some of the things that make HR really, really hard 'cause you care about people and you don't wanna see them struggling in this way. And the answer sometimes is so clear to us,

here's a resource for you, go get help. Take a leave of absence, focus on getting well, but if they choose not to do that, you're sort of left with, you have to treat them like an adult. You have to treat them in the same way that you would everybody else. And if there's an attendance problem, regardless of really what the issue is and you've extended help and they're not accepting the help that you're offering related to that, I mean, we're kind of stuck in a situation where you do have to hold them accountable.

- Yeah, I had a situation in my career where somebody had documented performance concerns. We had gone through several iterations, performance improvement plan, the whole bit. And when it got to the time of actually needing to pull the trigger on termination, this person was about eight months expecting. And it was so very, very hard as an HR person and as a female and as a mom and all the kind of things, but that's where you double check, right? You make sure you've done all the things, like everything you just talked about, having the honest conversation, talking about accommodations, getting creative about solutions, using your EAP. From a risk perspective, have you done everything possible to set this person up for success? And typically I think most of us would go like above and beyond what we necessarily need to do legally. But at the end of the day, you got to hold them accountable to performance expectations, especially if you've been very clear about it. If you've been very clear about what's expected, you have to hold people to that. It's a tough part of being an HR person.

- It is hard. I mean, it's just, if you were looking at it from a personal perspective and what are the types of things that maybe you're doing to enable somebody's behavior? And we don't wanna do that either. I mean, I think that you can handle the situation in a very compassionate, supportive way, and we can provide them with different resources. And I mean, I've gone to extents where I've made some phone calls for them just to say like, let me gather some information for you to help you. But if they don't want the help, what are you gonna do?

- Yep, all right, on to our next tough one. Again, warning, this is a little bit longer. So as a seasoned HR executive with 14 years of HR experience, I've never experienced anything like this. I lead a people function for a very lean software development company. Recently I had my annual with my CEO, in which he had nothing to say about my performance and he just spit out random words to have something to say, I guess to be "standard" who knows. He found out that I'm pursuing my PhD online, and the majority of his talk was that he didn't support that and we would have a different conversation should I pursue further education. Keep in mind he has no degree nor does he care about the value of education. This I know to be true. He also approved a raise but only half now and half in six months. All of that being said, he has not communicated with me on work things since then.

I've sent multiple messages, requests, et cetera, all related to things internally, nothing. I see him active in other areas and he's just completely ignoring me. Does he feel bad for what he said hoping I'll quit, like what's the deal? Honestly, capping my continuing education when I pay out of pocket really just demotivated to me. What would you do?

- Oh, man, well, this is the CEO. I think I would have a pretty serious heart to heart with that person and just say listen, first of all, the feedback is really important to me. I wanna make sure that I am operating in the way that you would expect for this organization. And I'd go into that and then the flip side of that is I am pursuing higher education for these reasons. It's not necessarily because I'm expecting a higher title or higher salary, this is something that I'm doing for myself as part of my own personal continuous learning and continuing education. And really to me I feel like this is a complete misalignment of values. And that one's really tough because if you're working for an organization that doesn't share the same values that you have and it sounds like the CEO is probably intimidated by this person because they are pursuing education and maybe it's threatening to them for some reason, I just don't know that it's gonna get any better.

- I also think that it's hard obviously we're just reading these off the internet so you're only getting one side of the story. So if I was this leader, I might be the CEO, I might be wondering, are they able to focus on work? There would be some additional questions I'd wanna ask as a leader. So that could be in the mix as she's making an assumption, it has to do with her higher education. It really could be like, hey, I hired you to do this role and if you're gonna be focusing on a PhD which I know is a lot of work, you're gonna be taking away from the job here at hand. But that all goes back to let's just have an adult conversation.

- That's right. Yeah, it's the transparency in saying and again, we all do this, I think this is human nature to some extent. We create our own narratives in our head around why people are behaving the way they do. And really the only way that you know for sure is by having an open conversation with them. And so asking like, and I think also not just asking about kind of what are your concerns by me pursuing higher education? Do you have any concerns? Do you have any concerns about how this may or may not impact my work with the company? But then also sharing what your values are, you know what I mean? And just saying, this is something that's really valuable to me. In sort of a similar situation that I've had in the past where I wanted to pursue education and I knew it was actually going to impact my work, and it was really, really early on in my career and I didn't make any sort of announcement but I resigned. And they came back to me going, wait, wait, wait, why are you resigning? You said you wanna pursue education, I was like, well, yeah, because it's gonna impact my hours.

And they said, well, let's have a discussion about that and maybe we can find a way. And I just thought, and that was really, really early on but it taught me a lot around, don't make an assumption about what you think it may or may not have an impact on. And so just being really honest and putting it out on the table. Now, at that point in time if they're saying, something that just totally rubs you the wrong way, I mean, maybe at that point you have to make a decision, is this really where I wanna be? Because you wanna be with people who are gonna be supportive of you continuously learning.

- Yeah, all right, I think we got time for one more.

- Okay.

- I recently took an HR manager position. I was an external hire and after being hired I learned I was hired over one of the generalist who was internal. Needless to say, it hasn't been a warm and welcoming, and this person has been stonewalling me. Whenever I try to start the conversation to address it, she either is too busy, gets overly defensive, or calls him. The recruiter from my former company called and asked me if I knew this generalist because they applied to my former position which is still open. Should I say something to the generalist? I'm honestly okay if she leaves, there's a huge skills gap and it's hard to develop someone who you do not trust and doesn't .

- Well, I have questions. I mean, first of all, is this a reporting relationship? Like did this person take an HR manager role and this generalist is reporting directly into them? Because if that's the case, then I would probably handle it a little bit differently just in the sense of like, hey, we need to meet regularly and I'd like to build a relationship with you. And I would be just transparent about the fact that I'm aware that you had applied for this role. Obviously, that's something that you are aspiring to become. And so let me partner with you and help you build those skills and identify what those gaps are and how I can support you and stuff. If there's not a reporting relationship, I mean, I think whoever they are reporting into, I think I would have a conversation with them just around, hey, making you aware of the fact that here's kind of how this relationship is going. I'm doing my end to try to nurture the relationship. But I mean, if they don't wanna reciprocate they won't. And if I found out that they had applied for a job that I had vacated, I mean, I don't know that I would even, why? I mean, why even bring it up? You know what I mean? I've had that happen and this is common, unfortunately this is common where people do apply for a job that's available. And even if somebody does get it internally but somebody else doesn't get it, there's hard feelings. And my guess is there's probably, they feel inferior or maybe they feel embarrassed about the fact that they didn't get it. There's a number of feelings that are around that. And I would just wanna come alongside that person and just say, let's work on how we can help you get there. Let's work on why you didn't get the

job in the first place. Can you get some feedback on how that went? Is it your skillset? Is it just the way that you interviewed? Is it whatever? But at the end of the day, if they don't want to engage in that, they're not going to. So you can only do as much as you can. What are your thoughts?

- I find it interesting that the recruiter reached out. I mean, we don't have all the details again so it could be a basic HR reference job so you just kind of get some details that way. It is complicated though, if it's a reporting structure I agree, like when she kinda made the comment about like, hey, the person doesn't have time for her. Well, if you're the manager you say like we're gonna have time. We have to work together and here's my expectations and how we're gonna work. So you have to rip the bandaid off with that. But it is complicated. I once was in a junior role with my education, didn't have the experience, I was really fortunate working for somebody who kinda gave me an opportunity, and I saw a job opening that I was like, oh, this would be a great step up. It would be a great role, it was kind in the same industry. And I remember sharing with the person I was working with at that time that I had applied for the role. Unbeknownst to me, this leader went and applied for the same role. Had no idea she was looking, wanted to leave the organization. And obviously she was more experienced than me, and I remember that feeling of just like, I wasn't ready yet, I knew I wasn't ready yet, but like to kind of be defeated that way, it would've been much better if I had had a conversation and her to say like, hey, you know what? I know you applied for this role, here's the deal. You know, I didn't find out until I didn't get the role and found out she got the role and I was like this is crazy. But yeah, there's hard feelings involved with that stuff but you hit the nail on the head about let's have a really honest conversation about how you showed up in that interview and where your skills are and how I can help you develop them. I mean, what a great opportunity to level up and to learn from that experience.

- Yeah, and I think there's a common thread I think in most of these questions that we discussed today. And that is, there's a lot of uncomfortable things that happen. And really the best way to handle most of them if not all of them is just, let's have an honest conversation. Even going back to the question about the Thanksgiving potluck, let's just have an honest conversation. Let's talk about our employee population. How do people feel about that? And maybe what we call it this year isn't what we call it next year. Like, let's have a conversation about how people react to this. Because at the end of the day, we are all in this together, we spend a lot of time together and we need to understand, what are people's backgrounds? How do people feel about these things? And if you're creating an environment of development and honesty and transparency, like all of these things, they feel a little uncomfortable at first, but it opens doors to a much bigger conversation in the end. And one that you can nurture one

another. So it is about continuously learning and I think you learn a lot about your organization in that way. If they don't share the same values that you share, then maybe that's a time to say, you know what, maybe I'm ready to move on to something different. But I'm all for helping people to develop and I wanna build that relationship with them. I wanna have a good relationship with my colleagues and my peers and subordinates and I can only do my part if they don't wanna lean into that and utilize my expertise. And the thing is that you learn from each other. This isn't just about like, hey, let me help you build your gaps. But like hey, you can help me in areas that maybe I'm not as strong in as well and build that partnership. And hopefully they would be able to do that.

- Couldn't agree more. Thanks so much for jumping on and tackling some of these unique HR questions that exist out there in the web verse for us.

- Well, I'm always happy to, these are always fun.

- I hope you enjoy today's episode. You can find show notes and links at thehrmixtape.com. Come back often and please subscribe, rate, and review.