



## Human Resource Consulting Services for Community Banks

USource® provides trusted human resource consulting services specifically designed for community banks. Individuals responsible for human resources at community banks often wear many hats and have few reliable resources to stay up-to-date with trends in human resource practices and employment law regulation.

United Bankers' Bank has designed USource to help community banks navigate the increasingly complex aspects of human resources, such as employee relations, performance management, compensation, and more. We recommend solutions to minimize your time commitment to developing consistent and effective human resource programs.

**The services offered through USource include:**

### Employee Handbook

USource uses an interactive process to develop an employee handbook for your bank that communicates its unique culture and values to its employees while ensuring policies are aligned with employment laws and human resource best practices. USource customers also receive timely handbook revisions when new legislation requires them or when bank policies change. As a best practice, it is recommended that an employee handbook review be completed annually.

### Human Resource “Hot Line”

Staffed by a team of trusted HR Advisors, USource is your first call for help providing timely, accurate and invaluable responses when you need it. Whether it is an urgent matter such as an employee termination, or answering questions regarding next steps with a leave of absence, or locating a form, we are here to help. There is a toll-free number (866-384-1984) or email address ([USource@ubb.com](mailto:USource@ubb.com)) available to USource members to discuss human resource issues and regulations, and to ask questions such as:

- Do I really have to order this poster?
- Should this employee be non-exempt? Do we have to pay overtime?
- Do you think this level of disciplinary action is right? Will you review what I have written? •
- Do I have to respond to this unemployment questionnaire?
- An employee has not shown up for work for two days and has not called in; what can I do?
- What additional requirements does the bank have if we go over 50 employees?
- What state or federal posts do I need?

### Webinars and Forums

USource Webinars provide essential and timely information on various topics and are presented frequently throughout the year, generally lasting about 45 minutes. Webinars provide an opportunity for community banks to learn how to comply with state and federal employment laws, as well as human resource best practices and trends.

Forums provide an opportunity to discuss human resource topics with a peer group from other community banks. Hearing about other banks' human resource challenges and successes can help to identify potential issues you may encounter and exchange ideas. Forums include presenting HR-related topics, with questions, discussion, and networking encouraged.



## Examples of Topics for Webinars and Forums Include:

- HR Basics for Supervisors
- Bullying and Harassment in the Workplace
- Performance Management
- Wage and Hour (FLSA)
- Exempt vs. Non-exempt
- Laws and Legislation Updates
- Americans with Disabilities Act (ADA)
- Requirements for Federal Contractors
- Managing Different Generations
- Workplace Trends
- Leave of Absence (FMLA)
- Background Checks
- Recruitment and Retention
- Training and Development
- Compensation & Benefits
- HR Metrics to Measure
- Onboarding
- Mental Health
- Wellness Programs
- Burnout
- Recognition
- Disciplinary Action  
Counseling  
Coaching  
Termination

## Human Resource Library

USource has an extensive online library that includes information and best practices in recruitment, performance management, employment regulations, and labor law posters by state and compensation, along with various sample forms to use. There is also a section with templates and examples of information needed to develop your own job descriptions. In addition, current and previous recordings of USource Webinar PowerPoint presentations are available on demand.

## USource Communication Methods

USource provides timely updates to its members to help them stay current in the frequently changing HR environment. Communication of essential matters, including best practices, trends, and changes in employment laws, will be via emails, webinars, forums, or phone conversations.

## Bank Compensation and Benefits Survey

USource sponsors an annual comprehensive survey covering salary and bonus benchmarks and information on projected pay increase rates, benefit programs, incentives, metrics on employee turnover, and more. USource members who participate will receive a free report for their state or region and discounted pricing on additional reports.

## Customized Services

### Pre-Employment Assessments

We offer a variety of web-based pre-employment assessments to assist with selection. Customers provide us the applicant/candidates name and e-mail address. USource sets up the assessment and upon completion, provides a report as an additional tool to assist in selecting the most qualified individual who best fits the organization. Assessments may also be used for current employees, to assist with making decisions on transfers or promotions. A price list and brief explanation of the assessment is provided to an interested bank. The cost of an assessment vary depending on the position and areas being assessed.





### Affirmative Action Plan Development

Banks as federal contractors, with 50+ employees and a government contract (often FDIC annual expenses) of \$50,000 or more, are required to develop an Affirmative Action Plan (AAP) annually. USource provides this service to community banks, developing an AAP that meets the Office of Federal Contracts Compliance Program’s (OFCCCP) requirements based on Executive Order 11246. The development cost of an AAP depends on factors such as the total number of employees, the number of employees at each location, and recruitment areas.

### Employee Surveys

Surveys are an effective way to tap into the thoughts of your employees. Web-based surveys preserve the confidentiality of employees’ responses, leading to candid feedback. The employee satisfaction/engagement survey identifies employees’ level of satisfaction with their jobs, compensation, benefits, training, and work environment. USource will tabulate the results and send a full report.

Depending on your bank’s specific needs, additional services, and special projects may be available (cost-negotiable).



### Pricing

One-Time Initial Membership Fee: \$500

Monthly Basic Services Fee: \$220

### USource Services

### Member

### Non-Member

|                                             |                                                           |                       |
|---------------------------------------------|-----------------------------------------------------------|-----------------------|
| Human Resource “Hot Line” for questions     | Included                                                  | N/A                   |
| Employee Handbook: Develop or Review/Revise | Included                                                  | \$2,000               |
| Access to the USource Library               | Included                                                  | N/A                   |
| Job Description Templates                   |                                                           |                       |
| Employment Law Updates                      |                                                           |                       |
| State and Federal Labor Law Posters         |                                                           |                       |
| Forms                                       |                                                           |                       |
| Bank Compensation and Benefits Survey       | Included for participants, discounted for nonparticipants | Report prices vary    |
| Forums                                      | Included (1-2 pers)                                       | \$250 per participant |
| Webinars                                    | Included                                                  | \$95 per participant  |
| <b>Customized Services</b>                  |                                                           |                       |
| Pre-Employment Assessments                  |                                                           |                       |
| Employee Survey                             |                                                           |                       |
| Affirmative Action Plan Development (AAP)   |                                                           |                       |

Prices Vary

Prices are subject to change.





## USource Agreement

Bank Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ ST: \_\_\_\_\_ Zip: \_\_\_\_\_

No. of Bank Employees: \_\_\_\_\_ Branch Locations (city names): \_\_\_\_\_

Bank Contacts – Names, Titles, Phone & Email: \_\_\_\_\_

The initial fee to join USource is \$500 and a monthly fee of \$220, due on the first of each month, for a minimum period of 12 months. United Bankers' Bank's ("UBB") USource agreement will continue automatically upon completion of the initial 12-month period. After the initial 12-month period, this agreement may be nullified by either party with 30 days' written notice.

USource human resource management services provide current and accurate information to assist our members. All USource services are provided with the understanding that UBB does not intend to render any legal advice in providing such services or products.

UBB, including its officers, employees and agents, shall not be liable for any loss or damage other than that caused by its gross negligence or willful misconduct. In no event shall UBB be liable for indirect or consequential damages or lost profits, even if UBB had notice of the possibility of such damages or losses. The maximum extent of UBB's liability hereunder shall be limited to an amount not to exceed in aggregate the total fees paid to UBB for services rendered under this agreement.

Initial one-time fee of \$500 and monthly fee of \$220:

Please debit my UBB DDA account # \_\_\_\_\_ for \$220/month, plus the initial one-time \$500 membership fee.

I do not have a DDA account; please contact me to set up a DDA account or another form of payment.

Please enroll us in USource on the first of: \_\_\_\_\_  
Month Year

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

