

Callie Roberts

Director, Associate Relations Operations and Governance

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STRENGTHS

- 🔍 **Fair case judgment**
Sensitive matters received balanced review, clear evidence checks, and practical decisions that gained confidence from partners.
- 🏗️ **Workflow discipline**
Case steps became easier to follow after intake, escalation, and closure standards were clarified for busy teams.
- 🔍 **Quality insight**
Review findings turned into useful training and process changes, and peers sought guidance on difficult cases.
- 👥 **Partner trust**
Legal, Compliance, and Human Resources partners received clear summaries and steady communication during high risk reviews.
- 🎓 **Practical learning**
Investigator onboarding connected interviews, evidence, notes, and decisions, helping new practitioners build sound habits.

SKILLS

Associate Relations

Employee Relations Investigations

Employment Law HR Acuity

Governance Quality Assurance

Audits SLAs Corrective Actions

Policy Interpretation

Risk Mitigation Calibration

Process Improvement Reporting

SUMMARY

Associate Relations and **Employee Relations** leader with 10 years of experience building fair, consistent, scalable case operations across complex, multi region organizations. Leads intake, triage, investigations, escalation, **corrective action**, resolution, governance, quality assurance, and audit practices with strong attention to employment law risk and documentation quality. Converts strategy into practical workflows, service level agreements, **operating procedures**, decision frameworks, interview guides, case summaries, and reporting standards. Uses HR Acuity, case analytics, calibration forums, quality reviews, and executive reporting to identify variation, rework, aging, and process risk. Partners closely with Human Resources, Legal, Compliance, and technology teams on sensitive matters. Brings sound judgment, clear communication, and a steady focus on fair outcomes. Ready to contribute disciplined operations and trusted partnership within a senior **Associate Relations** organization.

EXPERIENCE

Senior Manager, Employee Relations Operations

HarborPoint Financial Services 📅 July 2022 - Present 📍 Columbus, OH

Leads enterprise case operations across business units, supporting intake, triage, investigations, escalation, resolution, governance, quality reviews, HR Acuity reporting, and executive decision support. Partners with Human Resources, Legal, Compliance, and technology teams on sensitive matters while improving consistency, documentation, risk control, and service delivery.

- Aligned **case intake**, triage, investigations, escalation, and resolution standards across business units.
- Established quarterly quality reviews and **calibration sessions**, exposing documentation gaps and **policy interpretation** variation.
- Built service level standards and escalation paths, giving leaders clearer cycle time reporting.
- Redesigned **HR Acuity** fields, templates, and reports, improving case data quality and trend analysis.
- Created **investigation plans**, **interview guides**, case summaries, and decision checkpoints for sensitive matters.
- Presented quality, rework, aging, and risk trends, converting findings into training and workflow changes.

Employee Relations Manager

Meridian Health Services 📅 March 2019 - June 2022 📍 Indianapolis, IN

Managed complex investigations across clinical and corporate functions, applying consistent policy, legal, documentation, and **corrective action** practices. Worked with Legal and Compliance on escalated allegations, developed investigator learning programs, maintained audit ready records, and used case themes to improve policy guidance and manager practice.

- Managed complex investigations across clinical and corporate functions using consistent policy and legal practices.
- Introduced peer reviews for higher risk corrective actions, strengthening evidence assessment and decision rationale.
- Partnered with **Legal** and **Compliance** on escalated allegations, regulatory concerns, and investigation strategies.
- Developed investigator **onboarding** covering interviews, evidence organization, case notes, findings, and closure summaries.
- Analyzed recurring case themes and bottlenecks, guiding policy clarification and manager education.
- Maintained audit ready records and supported reviews of **investigation** quality, timeliness, and standards adherence.

Employee Relations Consultant

Lakeview Consumer Services 📅 August 2016 - February 2019 📍 Chicago, IL

LANGUAGES



MY CAREER



- Senior Manager, Employee Relations Operations at HarborPoint Financial Services (4.2 Years)
- Employee Relations Manager at Meridian Health Services (3.2 Years)
- Employee Relations Consultant at Lakeview Consumer Services (2.5 Years)

Conducted workplace investigations and advised Human Resources partners on policy application, corrective action, documentation, and escalation. Standardized intake and case files, prepared evidence based summaries for counsel, tracked aging patterns, and facilitated manager learning on workplace expectations and sound case handling.

- Conducted workplace investigations and advised Human Resources partners on policy application and **corrective action**.
- Standardized intake questions and case files, improving capture of allegations, witnesses, evidence, and outcomes.
- Prepared **case summaries** for **Human Resources** and counsel, clarifying evidence, policy considerations, risks, and next steps.
- Tracked case aging and **escalation** patterns, identifying matters requiring additional review and leadership attention.
- Facilitated manager training on workplace expectations, documentation discipline, and appropriate escalation practices.
- Supported cross functional reviews of recurring issues and updated procedures and reference materials.

PROJECTS

Enterprise Case Quality Program 📅 2024

Built a practical quality review model with audits, calibration sessions, decision checks, and reporting. Shared goals with Human Resources, Legal, and Compliance partners helped create clearer standards and more consistent case outcomes.

HR Acuity Data Improvement 📅 2023

Partnered with technology stakeholders on fields, templates, and reports that improved case capture and trend visibility. Regular conversations with users surfaced useful changes and strengthened confidence in operational reporting.

LEADERSHIP & AWARDS

- Recognized by senior leadership for improving case governance, quality reporting, and decision consistency across business units.
- Selected to lead cross functional calibration forums that strengthened investigation practices and shared judgment among Human Resources partners.
- Trusted with sensitive, high risk matters requiring sound judgment, careful documentation, and close partnership with Legal and Compliance.

EDUCATION

Bachelor of Science in Human Resource Management

Indiana University Indianapolis 🎓 GPA: 3.5 📅 2016 📍 Indianapolis, IN

Coursework: Employment law, Human resource management, Organizational behavior, Labor relations

CERTIFICATIONS

- SHRM Senior Certified Professional 📅 2024
- Workplace Investigations Certificate 📅 2023

TECHNICAL SKILLS

- **Case Operations:** Intake, triage, escalation
- **Investigation Practice:** Interview guides, evidence review, case summaries
- **Governance Standards:** Policy interpretation, decision frameworks, corrective actions
- **Quality Assurance:** Audits, case reviews, quality metrics
- **Workflow Management:** SLAs, operating procedures, resolution workflows
- **HR Systems:** HR Acuity, data capture, case reporting
- **Employment Law:** Employment law, regulatory requirements, risk mitigation
- **Analytics and Reporting:** Cycle time, rework, aging trends
- **Learning Programs:** Onboarding, training, continuous learning
- **Calibration Methods:** Calibration sessions, peer review, decision checks

- **Documentation Controls:** Documentation standards, templates, audit records
- **Stakeholder Platforms:** Human Resources, Legal, Compliance

PROFESSIONAL AFFILIATIONS

- Society for Human Resource Management, senior practitioner engaged with evolving employee relations standards and workplace practice.
- Association of Workplace Investigators, professional community focused on fair investigations, evidence quality, and defensible decisions.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST