

# **Workforce Planning:** **Maximizing the New Reality of a Revolving Workforce**



## **Final Report**

**October 2015**

***Project Team #5***

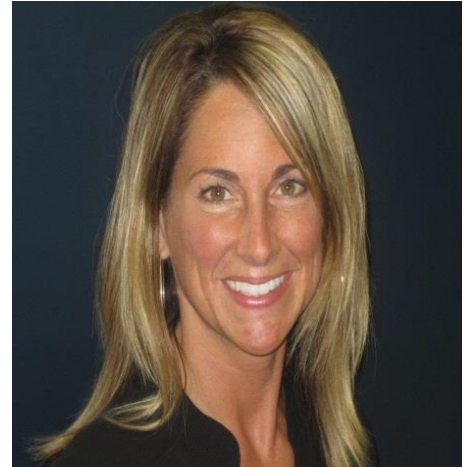
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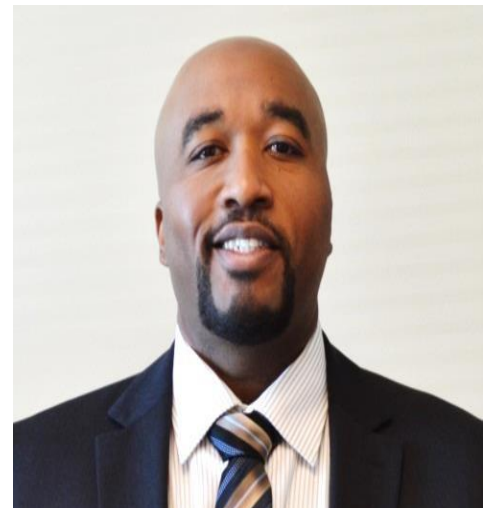
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## Table of Contents

Acknowledgements.....	5
Abstract.....	6
Introduction .....	7
When They Leave Public Transit Jobs .....	7
The Millennial Effect .....	8
Fair Game Employees .....	9
The LeBron James Effect .....	10
Cost of Replacing Our Most Valuable Assets – Our Employees.....	10
Managing Your Talent Pipeline .....	11
Identify → Understand → Retain .....	11
Identify .....	12
Understand .....	12
Retain .....	12
ENGAGEMENT.....	13
What is the driving force behind the new rules of engagement? .....	13
The new world of work changes the way we engage people:.....	14
Benefits of Effective Engaging Employees .....	14
Early Engagement through Onboarding .....	14
Learning from the Outside .....	14
What is Onboarding? .....	15
How are we onboarding in the Transit industry? .....	15
Who’s Doing Onboarding “Right”? .....	15
Southwest Airlines .....	15
Zappos.com .....	16
Wipro Limited .....	17
Wegmans Food Markets .....	18
Onboarding Manages Top Talent .....	18
INTERNAL DEVELOPMENT: LIFE AFTER (1) DAY ONE .....	19
Return on Your Investment.....	19
INboarding .....	19
Why INboard? .....	20

Alignment with Organizational Goals .....	20
No More Rigid Job Descriptions.....	21
Career Goals.....	21
Communicate...All of the Time! .....	21
Build-And-Buy Approach.....	22
Learning from the Private Sector .....	22
The Container Store: (16yrs).....	23
Scripps: (8yrs).....	23
INBoarding within Our Industry.....	24
Dallas Area Rapid Transit (DART) .....	24
Transportation Career Link .....	24
DART Academy.....	24
Management DART .....	25
Multi-Agency Exchange.....	25
Leadership DART .....	26
Greater Cleveland RTA Collaboration with CSA.....	26
CONCLUSION.....	27
Call to Action - Maximizing Your Revolving Workforce! .....	27
APPENDIX.....	29
Industry Survey .....	29
Methodology.....	29
Major Findings .....	30
Complete Survey Results .....	30
Bibliography .....	45

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## Abstract

Team “People Ready” is sharing the industry’s most successful strategies for executive managers everywhere for cutting edge onboarding of new employees, maximizing employee engagement, and optimizing employee retention. According to a study from the Transportation Learning Center, nearly half of the transit industry’s current employees will be retiring over the next ten (10) years while the transit workforce is expected to expand by almost forty percent (40%) in the same period!

This means we’ll need to hire and train roughly ninety percent (90%) of today’s total transit workforce in Public Transportation just to maintain and break even by 2025! Are you ready to embrace this reality? How well have you really stress-tested your organization to withstand this revolving workforce? As Chief Executive Officers (CEOs) and General Managers (GMs), the success of your agency ultimately depends on the people you employ.

Team “People Ready” surveyed many transit agencies who shared their challenges and the impact employee turnover has had to their agency’s identity, growth, brand, and most of all, their customers. Our team will share our research, which will provide valuable resources for GMs and CEOs while revealing current trends and best practices within the industry, while also taking a look at what others outside are doing in order to compile effective strategies in talent management and maximizing employee engagement.



## Introduction

### When They Leave Public Transit Jobs

Transit employees are retiring at an alarming rate and over the next decade. Nearly half will be gone taking with them their experience, ideas and creativity, institutional knowledge and expertise forged through years of being developed within the industry. In addition, we are expected to expand our industry's workforce by nearly 40% over the next decade in order to keep up with growing demand. In the face of this impending tidal wave of change, we must recognize the fact that the Millennial generation will have different work needs and desires than our retiring employees and be prepared to accommodate their needs for growth and job satisfaction.

No matter what small or large town or city you visit, you'll likely encounter some type of public transit operation. Transit's customers expect safe, reliable, and quality service to be a seamless day-in and day-out part of everyday life. All public transit operators look and feel a little bit different, but what many public transportation agencies do have in common is their need to rely on experienced men and women to work in concert behind the scenes to deliver a reliable and functional transit system, one that even the most casual rider can use with relative ease. Getting to that point is riddled with challenges that many agencies commonly face. The question **Team People** asks (and proposes answers to) is this, *"How do you, the leader of your organization, maintain an experienced, balanced, and well-trained transit workforce in light of impending retirements and service expansions?"*

Many who have risen through the ranks in the public transit industry are to some degree staying in the field which is advantageous to the entire public transit industry when searching for new talent. It is not uncommon for new up and coming transit managers within public transportation to leave their employment to take advantage of opportunities in positions elsewhere within the industry. Losing employees, especially top talented individuals, can be costly, not only financially, but in other areas as well. In this paper, **Team People** seeks to educate you on how to identify top talent, invest in employees, and maximize employee productivity. Imploring these tactics will give way to strategies for improving retention, decelerating the revolving door of employees coming and going, and minimizing the impact to your organization when key people in key positions leave.

## The Millennial Effect

As we alluded to earlier, the Millennial generation has distinctive needs and expectations as they enter the workforce.

<sup>1</sup>Millennials will represent over 75% of the total workforce over the next decade. Millennials is the term used to brand the next generation of people whose birth years span from the early 80's to the early 2000's. This demographic has an inherently different set of values than their predecessors. Today's working generations which mainly consists of Baby Boomers, Generation X, and Millennials each have some distinctive work habits and needs from employers. Those considered Boomers and Gen-X'ers are encouraged



by family life and stability. They may have fewer employers over the course of their careers than Millennials, and are more focused today on properly planning for retirement by adding to the value of their retirement plans, increasing savings, paying down debts, and maintaining employment stability as they wind down their careers. Some shared Boomer and Gen X'er traits may also include staying with employers longer – such as 20 and 30 years or more and raising a family which requires secure employment in order to ensure long-term stability for taking care of household and family needs. Boomers and Gen X'ers may be more inclined than Millennials to strategically plan their financial futures even if it means taking on a 2<sup>nd</sup> job or making other life sacrifices.

For the past several decades employers have understood what they're getting from Baby Boomers and the Generation-X workforce, that being, employees that may likely invest multiple years with a single employer, take on rigid schedules or increased work hours, and embody a do-whatever-it-takes attitude to get the job done and accomplish goals, even at the cost of minimizing their available "me-time" or "family-time." Employers should expect these types of work habits to change over the next decade when contending with an increasingly dominant Millennial workforce and their quest for more work-schedule flexibility and achieving an optimal work-life balance.

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<sup>1</sup> Picture from <http://www.barrons.com/articles/> "On the Rise"

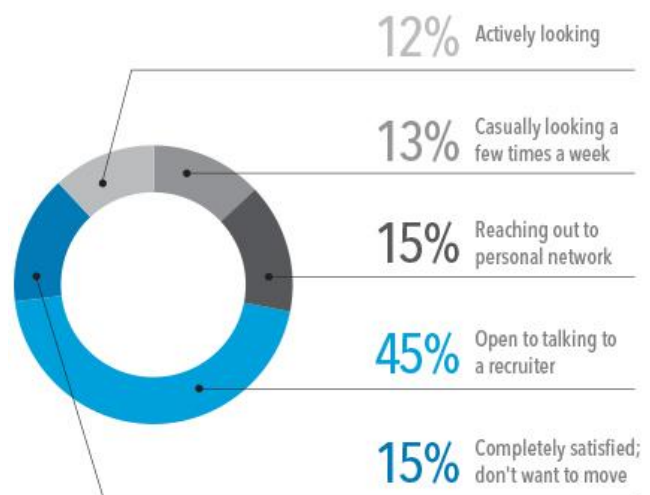


According to a study from <sup>2</sup>Millennial Branding and Beyond.com, over the course of a Millennial's lifetime, they will end up experiencing on average, five different careers across 17 employers including trying their hand at being self-employed at least once. Millennials will have an average tenure of three years or so before moving on to the next employer. Millennials are staying single longer and they may prioritize life goals and achievements other than starting a family or even owning a home. They're willing to be more mobile and move around if need be to achieve optimal or a better quality of life. Employers will have to manage nearly a 2:1 turnover margin when employing Millennials versus older generational rates. CEOs and General Managers will need to strategize and be creative for keeping their companies resilient through this change of generational cultures. Companies will lose Millennial talent if there is lack of structure or direction. Millennials crave goals and career opportunities. Companies will need to develop better retention strategies to keep Millennials and decelerate the revolving door.

The Millennial generation values will include must-have career-outlines, goal and achievement plans, and they desire positive workplace cultures and environments. CEOs and General Managers must remain flexible and start implementing programs **now** in order to remain "choice" employers and stay competitive in the job market in the near future.

### Fair Game Employees

Not only do we need to prepare for a generational workforce change, but we must also contend with the fact that our current talented crop of workers may leave us for opportunities with other employers! According to a survey by a <sup>3</sup>LinkedIn Talent Trends report, only 15% of employees are completely satisfied with their present employment and do not wish to leave. This means that most everyone else can be considered "fair game" and on the market! Nearly 45% of employees (according to



Talent Trends) are open to talking to a recruiter and at least reviewing their options. Others are generally open to exploring whether or not better opportunities exist by either seeking out a personal network or even casually perusing the job market a few times per week. The fact of the matter is, if your organization is not paying close attention to your employees' needs, nor

<sup>2</sup> <http://millennialbranding.com/2013/cost-millennial-retention-study/>

<sup>3</sup> "Fair Game" Graph - <http://talent.linkedin.com/blog/index.php/2014/03/active-vs-passive-candidates-the-latest-global-breakdown-revealed>

providing growth and development opportunities, and if employees feel under-appreciated, they will ultimately leave you.

### The LeBron James Effect

We can learn a lot from LeBron James and the <sup>4</sup>City of Cleveland regarding what it means to lose your top talent. When LeBron James left Cleveland in 2010 to bring his talents to South Beach, the entire Cleveland Cavaliers franchise went downhill very quickly. Cleveland went from being a competitive playoff team to having a losing record, missing the playoffs, not to mention it experienced declining revenues from a massive drop in attendance. The value of the entire franchise plummeted several hundred million dollars! The city's commerce as a whole also took a large hit as TV contracts, tourism, and revenue from businesses such as fan shops, restaurants, bar and grills, hotels, and other entities that benefitted from the success of the Cleveland Cavaliers saw their numbers rapidly decline as well.



According to <sup>5</sup>Business Insider, LeBron James, arguably the best NBA basket player in the league and possibly the world, has potentially had nearly a \$500 million impact on the city of Cleveland since his return in 2014! **Team People asks** - *Have you identified the LeBron James or James (es) on your team? Do you know what their worth and impact is on your organization?* If answered “no” to any of the questions above, then Team People recommends you find out very quickly!

### Cost of Replacing Our Most Valuable Assets – Our Employees

As Cleveland learned, turnover is a costly venture. In the US, the time it takes to recruit, hire and develop a new employee is on average 1 to 2 times the cost of the annual salary for the position in which the person is replacing. For your most talented individuals this cost increases upwards to 4 or 5 times the cost of the position's salary. The dollars that may be saved from holding on to your top talented individuals could mean huge dollars that could be spent elsewhere. In our industry, money equals service. Retaining just four employees and avoiding the need to recruit, hire, and train for replacing them could mean adding one (1) bus of peak service on the road for your customers. Imagine that!

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<sup>4</sup> LeBron James Graphic - <http://successinhr.com/talent-retention>

<sup>5</sup> <http://www.businessinsider.com/lebron-james-cleveland-economy-2015-2>

## Managing Your Talent Pipeline

In order to reduce turnover and prepare for the revolving door, the first step for CEOs and General Managers is to determine your agency's personnel needs and identify your top talent. It's also critical to identify your employee's needs and understand where your employees wish to go in their careers in order to properly set an organizational structure that will enhance, optimize, and capitalize on your employees' strengths. **Team People asks** - *Can you provide this guidance for your team? Are you prepared to lead this charge for your organization? Have you put others in the position to develop your agency's talent thereby placing your employees in a situation where they can succeed?*

### Identify → Understand → Retain

Unfortunately, if you as the CEO or General Manager are unable to recognize and identify your top talented key players and decision-makers, it may be only a matter of time before someone else does and acts accordingly. To play on a theme from the movie "Taken," your rival competitor (1) will find your talent, (2) will identify their strengths, (3) will offer them a better work situation, and (4) will take them from you! In order to hold on to your top talent, you must, (A) figure out what your talented employees value; (B) discover what their needs are; and (C), provide and grant the resources and tools necessary to properly engage.



## Identify

Identify your talent through interaction and goal setting. Most companies hold annual performance reviews or at least administer a way to measure performance on a consistent basis. <sup>6</sup>Pay attention to who is hitting or exceeding their marks. Determine who within your agency seems to not only excel within their entire department but also is affecting positive change throughout the entire organization. Identify **WHO** is bringing new ideas to the table, and **WHO** is progressing your agency's value through innovative thinking, paradigm-busting, and reconciliation of outdated practices and processes. An attentive CEO and General Manager should know exactly who their standouts are, but the question now becomes, what are you doing to hold onto them?

## Understand

As leaders of the organization, you must understand what drives your people to succeed. Is it just a paycheck? Great benefits? Promotional opportunities? Passion for the job? Do they love working for you and pleasing you through their efforts? It is extremely important to understand what works well so that you may expand upon these principles. Conversely, understand what annoys your employees. The number one complaint amongst employees about their boss is lack of communication regarding exactly what the boss wants. There can be no expectation without direction. According to a <sup>7</sup>BambooHR survey the greatest employee annoyances stem from disconnect from management, lack of recognition, unfair promotional structures, and subpar benefits.



## Retain

Turnover can be good. It gives the agency an opportunity to bring in fresh minds, new energy, and provides an opening to try new processes, and dump antiquated procedures. Turnover can rid an employer of headache employees and provide the chance to eliminate old positions and create new roles. However, there are benefits to controlling retention as well. Let's face it,

<sup>6</sup> "Why People Leave" and "Deal Breakers" Graphic - <https://www.recruiter.com/i/bamboohr-study-reveals-top-5-workplace-deal-breakers-infographic/>

<sup>7</sup> "Annoy Employees" Graphic - <https://www.recruiter.com/i/bamboohr-study-reveals-top-5-workplace-deal-breakers-infographic/>

turnover happens. No matter how well run an organization is run, people will leave. It may be that you are such a great leader and manager that you have developed some of your employees beyond the opportunities available within your organization. People leave for a variety of reasons beyond your control. What you don't want is people leaving for reasons that **are** within your control. The great CEO and General Manager can change the narrative on retention by directly affecting the change on turnover through strategic engagement principles.

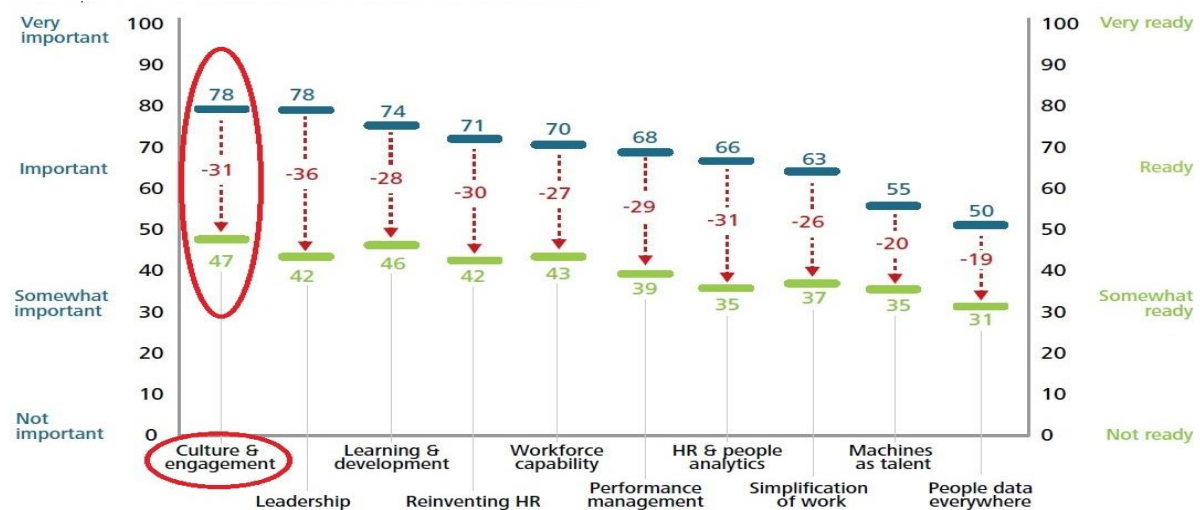
## ENGAGEMENT

*You've identified your top talent. Now what? How do you prevent them from leaving? Through our research, we learned that employee engagement is the key to keeping top talent and decelerating the revolving door.*

### What is the driving force behind the new rules of engagement?

In today's workforce, employees fully understand their value to a company thus requiring CEOs and General Managers to redefine how they engage employees. Employees are leveraging their position and becoming more like free agents in professional sports. They know we need them in order to thrive and succeed.

Millennial employees are pushing this new focus by expressing their expectation to employers with roughly two-thirds believing it is management's job to provide them with accelerated development opportunities in order for them to stay. This is not just here in the United States, it's global. <sup>8</sup>A Deloitte University study found that employee engagement and culture issues present the top challenges for businesses worldwide.



Graphic: Deloitte University Press | DUPress.com

<sup>8</sup> Deloitte University Graphic on Talent Trends - <http://www.greatplacetowork.com/publications-and-events/blogs-and-news/2932-deloitte-hr-wake-up-call#sthash.JvqY04h8.dpbs>

## The new world of work changes the way we engage people:

Employees today work more hours and are nearly continuously connected to their jobs. They work on demanding cross-functional teams that often bring new people together at a rapid rate. Flexibility, empowerment, development, and mobility all now play a big role in defining a company's culture. As a result, today's workers have a new focus on purpose, mission, and work-life integration. Research shows that a variety of complex factors contribute to strong employee engagement, including job design, management, work environment, development, and leadership. Today, more than twice as many employees are motivated by work passion than career ambition, indicating a need for leadership to focus on making the work environment compelling and enjoyable.

Organizations must focus on culture and improve employee engagement in order to increase their ability to recruit and retain talent within their organization. If they do not, their revolving door of employees would spin out of control.

## Benefits of Effective Engaging Employees

Engagement is critical to reducing the revolving door.

- **Lower turnover:** Research from the Corporate Leadership Council shows that highly engaged employees are 87% less likely to leave their company than those who are unengaged<sup>9</sup>.
- **Increased productivity:** According to the most recent Gallup Q12 (Employee Engagement Survey of over 1.4 million employees across 34 countries 2012), the top 25% of employers with the most engaged employees were 21% more productive compared to employers reporting employee engagement in the bottom 10%.

## Early Engagement through Onboarding

*Identifying and creating top talent and engaging new employees starts on Day (1) One. How do we better engage our employees? We must excite, inspire, and invest in our employees the minute they walk through the door.*

## Learning from the Outside

Through research, **Team People** has identified many private sector companies already tackling the revolving door. This is achieved through Day (1) One employee engagement utilizing innovative onboarding programs which many in the transit sector should be open to trying and exploring for themselves.

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<sup>9</sup> Corporate Leadership Council 2004 Employee Engagement Survey, Corporate Executive Board



## What is Onboarding?

*Onboarding is the process for bringing a new employee into a new work place. Onboarding includes basic orientations, filling out human resources paperwork, being introduced to new colleagues, and any formal or informal programs or processes new employees go through when starting a new job.*

## How are we onboarding in the Transit industry?

According to **Team People's** survey of almost 40 transit agencies across the United States, we learned that almost all surveyed transit agencies<sup>10</sup> provided some level of employee onboarding on the first day of work. 97% of agencies responded that they provided basic orientation, with an additional 74% reporting that they provided on-the-job training. 68% of agencies reported having some level of classroom training and only 34% provided cross-training to learn different jobs and skills.

Basic orientations were generally described as either a several-hour to one-day program focusing on completing necessary employment paperwork, reviewing employee handbooks, viewing human resources presentations, and meeting new colleagues. Only four respondents (10%) reported emphasizing the agency culture and engaging new employees as components of their onboarding programs.

Based on **Team People's** survey results and through conversations with over 20 transit executives, the Transit sector may have some room for improvement when it comes to focusing on innovative onboarding practices that engage and excite new employees.

## Who's Doing Onboarding "Right"?

Many private sector companies have excellent reputations for engaging and exciting employees on Day (1) One. Four of the top companies that are seen as the "best of the best" are Southwest Airlines, Zappos.com, Wipro Limited, and Wegmans Food Markets. These companies all attribute their onboarding programs as key to engaging employees upfront and reducing turnover. All four have employee turnover rates of at least half their peers' rates amongst the respective industries, essentially decelerating the revolving door!

### Southwest Airlines

**Southwest Airlines** is widely regarded as a great company to work for and is known for its focus on the front line and customer service. They are consistently ranked one of Fortune's Top-10 Most Admired Companies. Southwest



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<sup>10</sup> Team People Ready transit industry survey. See appendix for full results.

Airlines has over 46,000 employees and transports over 100 million passengers each year to destinations across the United States. Southwest believes employees are their number one (#1) customer and by endeavoring to both increase and improve their employees' on-the-job satisfaction, it will lead to much better service for their customers who hopefully in-turn shall become repeat-customers who will continue to choose Southwest for their future travel needs.

For Southwest Airlines, propagating their company culture and welcoming new employees is key to engaging new employees from Day (1) One. Southwest Airlines believes that successful onboarding is critical to their company's success and even employs a Director of Onboarding whose sole job is to oversee this process!

Onboarding starts with new employee orientation but doesn't stop there. Southwest recognizes that while filling out forms and seeing presentations is an important part of new employee orientation, their main program focus should be on showing new employees how *they* can make a difference at Southwest and how their *colleagues* can make a difference as well! Expectations of roles and the overall shared benefits of doing one's job well are clearly communicated. New employee orientation emphasizes respecting employees, creating a fun environment, and getting new employees engaged. The initial orientation introduces the culture, seeks to inspire, and includes games, prizes, and even karaoke.

Southwest Airlines believes the onboarding process includes the first year of employment, not just the initial orientation. After the orientation, they seek to continue creating a memorable experience for the new employee and to maintain the fun and excitement of the initial orientation. Every new employee is given a "sponsor" through the "Sponsor-a-New-Hire" program. In this program, all new employees have someone to connect with, check-in with, and show them what it means to work at Southwest. Continuous feedback and check-ins with management also occurs during the initial six months. New employees are also invited to attend talks with executive leaders, go to spirit parties, and participate in "Love-at-First-Bite" luncheons.

The Southwest Airlines onboarding program is seen as a major factor in keeping Southwest Airlines attrition to 5.5% annually which is <sup>11</sup>half the national average for all industries.

### **Zappos.com**

Zappos.com is an online retailer specializing in shoe and clothing sales and employs 1,500 employees. It is one of the largest online shoe stores. Zappos.com

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<sup>11</sup> <http://www.compensationforce.com/2015/03/2014-turnover-rates-by-industry.html>



has a four-week onboarding and training program. The goal of the program is immersing new hires in the company culture, forming a strong team dynamic, and forming close relationships with colleagues. All employees regardless of department or position must complete the four week program. The first two weeks of the program are in the classroom and include technical training, learning computer systems that Zappos.com uses, and customer service training since Zappos is all about providing excellent customer service. For the next two weeks, new employees go to the call center and take calls from customers so they learn who the customer is and what the customer wants and needs. At the conclusion of the four week program, a graduation ceremony is held for the class and each new employee is offered \$2,000 to quit. That's right - to quit! The reason this monetary offer is made to new employees is to weed out employees who either are not a good fit, or have not bought into the Zappos culture. Zappos realizes that employees who are not engaged and who are willing to take \$2,000 to quit are likely employees who may not be productive or would leave in a short period of time. This monetary offer is a strategy of minimizing productivity and employee replacement cost losses. Approximately 10% of new employees take the offer.

### Wipro Limited

Wipro Limited is another example of a company that is identified as one that successfully engages new employees during the onboarding process with fantastic results. Wipro is an India-based large Information Technology (IT) consulting business with over 150,000 employees. One of their major business focuses is global telephone (call center) and an online chat support for IT products. Wipro's annual turnover matched the industry average for call centers with turnover between 50-70% annually until they decided to try something new.

In 2011, Wipro performed an experiment with over 600 new employees hired into their call centers and online chat-support with the goal of determining if different techniques in onboarding could reduce expensive turnover. Wipro's previous onboarding program focused on employees learning about the company and human resources information. After the initial orientation, new employees received voice training and English competency training, as well as customer service specific training followed by on-the-job training where they shadowed current employees.

For the experiment, a portion of new employees completed onboarding that only focused on individual identity and how each could use their individual strengths on the job. Essentially the program focused on promoting employee self-esteem and self-expression. Prior to starting the onboarding program and orientation, new employees were asked to identify their personal strengths. During the introduction program for new employees, all employees were asked to present their "best self" and to introduce themselves along with their personal strengths. The program focused on engaging new employees on how their individual strengths could be used

and applied to their new job to improve the company. In addition, management reframed their management technique to focus on helping employees find and use their strengths to improve job performance. By doing this, Wipro experienced a 32% decline in employees quitting within the first six-months compared to the group of new employees who only received traditional onboarding introductions to the company and simple human resource orientation.

### Wegmans Food Markets

Wegmans Food Markets, Inc. is a supermarket chain serving the mid-Atlantic and New England regions of the United States. Wegmans has 85 stores and over 35,000 employees. The company was the top United States grocery chain in 2012 and 2014 according to Consumer Reports. Like Southwest Airlines, Wegmans believes in “employees-first, customers-second” as a key motto in promoting a healthy workplace and improving the employee and customer experience.

At Wegmans, successfully investing in employees from Day (1) One has paid off. As an industry, grocery stores on average have turnover approaching 40% annually<sup>12</sup>. At Wegmans, employee turnover is 8% annually, far below the industry average. Wegmans attributes their success to focusing on recruiting the right employees for the job. This includes caring about and respecting their employees, targeting resources and devoting staff time to ceremonies and programs that give back to the communities. This is accomplished by providing complete and comprehensive training for new employees which usually averages around six months per employee. Investing in employees and making them feel a part of a larger mission has helped keep people engaged, leading to lower turnover and better employees.

### Onboarding Manages Top Talent

As you can see, engaging employees on Day (1) One through effective onboarding is critical to decelerating the revolving door and maximizing employee productivity. Companies like Southwest Airlines, Wegmans Food Markets, and Wipro Limited have successfully implemented innovative and engaging on-boarding programs that have doubled their retention rates compared to peers in their same industries. However it doesn't stop there. In order to maintain employee engagement, establishing an internal mobility program can help employers increase productivity and optimally engage their workforce in achieving company goals. **Team People** takes a deeper look at the virtues of internal development and a process called “INboarding” as a way to keep the positive impacts from the onboarding process ongoing through the next phases of an employee's career track.

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<sup>12</sup> “Employee Turnover in a Grocery.” <http://smallbusiness.chron.com/employee-turnover-grocery-15810.html>

## INTERNAL DEVELOPMENT: LIFE AFTER (1) DAY ONE

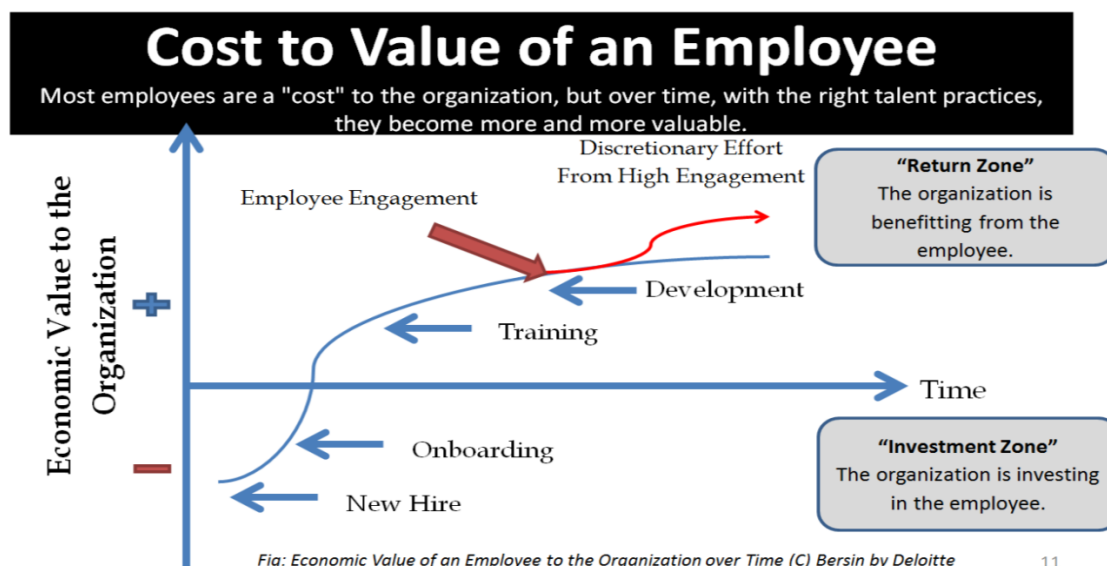
*What if instead of losing talent, even if to another transit agency, you were able to keep them by investing in them? Internal development and investment must continue to engage your employees in order to maximize employee productivity and reduce turnover.*

### Return on Your Investment

Most employees are a “cost” to the organization, but over time, with the right talent practices, they become even more valuable. The goal of most organizations is to effectively onboard individuals to shorten the time between orienting a new employee and when the employee’s contributions can be more directly related to the mission, vision, and values of the organization. Doing so also puts the organization on the path of maximizing the return on their investment. When you further train and develop your employees, the economic value of the employee increases. While in the “Return Zone,” (as seen in the figure below) employees are highly engaged and understand how their contributions add to the success of the organization.

*“Your next promotion may not be with our organization, but my hope is that it’s going to be within our industry. If we can grow the capabilities of our industry broadly, that’s a good thing.”*

- Doran J. Barnes, Executive Director of Foothill Transit and APTA Secretary-Treasurer



### INboarding

Many leaders fail to invest in their own employees. INboarding provides opportunity to employees to expand their knowledge, increase engagement, grow their skills, and better understand organizational processes. INboarding also provides a path for employees to learn about changing issues affecting their organization and better understanding the needs of the agency. Through the INboarding process, employees become more committed as their path of

opportunity widens. Additionally, INboarding is also an effective business continuity strategy because employees who have been effectively INboarded will be essential to move the organization forward despite turnover at any level.

Organizations that effectively INboard employees deploy a variety of strategies, not just one component or single program in isolation. During **Team People's** survey work and interviews, we found most transit employers are familiar with the practice of cross-training employees to be able to work in multiple areas. Surprisingly though, our surveys report only one-third of transit employers were actually engaging in this practice and utilizing INboarding techniques.

### **Why INboard?**

There is a difference between continuity and survivability. In talking with transit professionals, many organizations said they were “just coping” with turnover. To ensure your organization's continuity and resiliency, you must have a culture where knowledge and information is shared freely and employees have the necessary knowledge, skills, and abilities when key individuals leave. INboarding does just that. The intentional process of INboarding takes employees from good to great, it deepens your “bench-strength,” and top performers and those who will most likely contribute to your organization's success will quickly rise to the top. According to a recent article in the Harvard Business Review, only one-third (1/3) of hires are internal. Organizations are missing out moving top performers into great opportunities and key positions.

### **Alignment with Organizational Goals**

People want to feel part of something great, and want to feel they are making contributions to that add to their organization's success. It is imperative to talk with employees about the value your agency provides to your customers, and explain how the work they perform aligns with the organization's mission, vision, and values. Additionally, employees need to understand how the organization's mission, vision, and values serve as “guideposts” to the decision-making process. Through the INboarding process, employees are invited to executive leadership meetings where important decisions are being made, and reap the benefit of listening to senior leaders as they talk through decisions. When AECOM's Vice President Angela Iannuzziello owned her own company, she asked her employees to participate in management decisions as if it were their own business. Those meetings were about the delivery of the bottom line. She ensured staff had the information they needed to feel connected and had enough contexts to help make those decisions.

When employees better understand organizational goals and how key decisions are made, employees can more effectively perform high quality work that is of value to the organization and maximizes the return on their investment.



### No More Rigid Job Descriptions

Rigid job descriptions and walled-off departments do not exist in organizations that are good at INboarding. Projects are created that are not departmentalized, and offer opportunities to team members who express interest. For example, an organization might undertake a growth initiative, a wellness project, a social responsibility cause, or a community-involvement project.

**Team People asks** - *Which employees might be the best to assign such tasks?* Those who are most interested of course. Projects like these offer new avenues for personal growth, talent exploration, new connections, and the chance to gain visibility within the company.

At AECOM, individuals are often identified to participate on specific projects with the goal of providing them avenues for personal growth, talent exploration, and to make new cross-organizational connections.

### Career Goals

The most effective INboarding program aligns employee's career goals with the needs of their employer. Juniper Networks has already abandoned traditional performance appraisals, and have moved toward a model of ongoing conversation. The ongoing conversations are designed to improve employee skills that provide positive business results. When was the last time you asked your staff, *"What are your career goals?"* or *"What can we do to help you achieve those goals?"* Once individual career goals have been identified, the next step is to determine how individual goals can be leveraged in a way to meet organizational goals.

### Communicate...All of the Time!

The best way for employees to learn about the issues affecting their organization is through strong forms of communication. Communication can take a variety of means, but the key is the frequency of communication. Communication must take place regularly, and on a fairly predictable basis, so employees stay current on the shifting needs and issues facing their organization. Additionally, this level of transparency engenders high levels of trust and a sense of organizational ownership.

Many transit agencies do this work well. For example, at Sound Transit in Seattle, Washington, Deputy CEO/Acting CEO Mike Harbour shared they conduct an all-staff meeting twice a month, followed by a newsletter distributed to the staff. At the in-person meetings and in the newsletter, they discuss major happenings, celebrate milestones, and introduce new employees.

In Dallas, Texas at Dallas Area Rapid Transit, Gary Thomas shared he meets with small groups of employees twice a quarter to talk about whatever is on their minds. Once a quarter, he visits divisions. He explained, *"It's a great opportunity for two-way conversations!"*

### Build-And-Buy Approach

When organizations invest in their existing employee base through INboarding, employees know what is happening, they understand how organizational decisions are made, and they understand how they can most effectively contribute to the success of the organization. Then, when employees leave, other employees are positioned to take on positions and opportunities to ensure business continuity and resiliency.

*“The calculation of making the connection between talent and retention is gaining momentum as the competition for talent increases...CEOs are thinking more about keeping their people in ways that they didn’t five years ago”* **states China Gorman**, CEO of the Great Place to Work Institute.

According to a 2015 article in SHRM magazine, communications company, Polycom, in San Jose, California has shifted their focus to internal hires. In 2012, they had previously hired 75% of their employees from external sources. Now, only about 40% are external hires. Among the benefits of internal hiring, Vice President **Daniel Sonsino states** *“internal hires retain knowledge and get up to speed in their new roles more quickly than external hires.”* Polycom stands firm in their “build-and-buy” approach.

Additionally, research has shown that organizations that promote from within have more highly motivated staff. When employees are encouraged to grow their skills, they are more likely to stay with an organization, rather than looking elsewhere. Organizations benefit in a variety of ways by growing their own, building their employees’ skills, and then moving employees into opportunities where they can most effectively contribute.

### Learning from the Private Sector



INboarding is one of the top areas of strategic focus among the “Fortune 100 Best Companies to Work For.” The private sector has recognized that opportunities for professional growth are a smart way to drive employee engagement since it enables people to pursue a more meaningful career.

Fortune’s survey focuses on employee attitudes about management's credibility, overall job satisfaction, camaraderie, and culture. It includes detailed questions about pay and benefit programs and a series of open-ended questions about hiring practices, methods of internal communication, training, recognition programs, and diversity efforts. Based on this survey, companies like **The Container Store** and **Scripps Health** routinely top the list of the best companies to work for.

## Employee Ratings for Fortune’s “Best Companies to Work for..”

Name	Years on the list	Great Atmosphere	Great Reward	Great Pride	Great Communication	Great Boss
The Container Store	16	97%	94%	97%	94%	93%
Scripps Health	8	90%	89%	94%	87%	85%

### The Container Store: (16yrs)

The Container Store emphasizes being **employee-first** and calls themselves the “yummy” company, which is the opposite of a “yucky” company. The Container Store has built their brand on the joyful conviction that their employees are their top priority and their most treasured asset. They believe one Great Person equals three Good People in terms of business productivity. One of their key programs is dedicated training during the first year. Full-time employees receive 263 hours of formal training compared to the industry average of eight hours. Through investing in employee training and connecting employee contributions to the organizational goals, they have less than 10% turnover annually in an industry where the average employee leaves within a year.

### Scripps: (8yrs)

#### No-layoff philosophy

The corporate culture at Scripps encourages participation in decision-making and problem solving – the Build-And-Buy Approach. Over five years ago, Scripps launched “Employee 100,” a program that invites front-line employees to meet regularly with the Scripps CEO in order to create a forum with key leaders and encourage employees to share their opinions and learning moments. This program resulted in the creation of “Charting the Course to Excellence All Around You”, a visual communications map and engagement tool that helps Scripps managers and staff participate in meaningful conversations about important system-wide issues. The tool was designed by staff to prepare them for new challenges within the healthcare industry.



## INBoarding within Our Industry

Team People has found some great INboarding examples to share from the transit industry as well. These programs help to identify top talent, investments in talent, and talent engagement.

### Dallas Area Rapid Transit (DART)

Gary Thomas, CEO of Dallas Area Rapid Transit (DART), recognized that engagement with employees goes far beyond employee meetings and surveys. If an organization is going to be successful, they must be committed to providing on-going development tools for all employees. This belief resulted in the development of a suite of elective programs offered, structured, and customized for all levels of their organization. All training programs are targeted to specific segments of the workforce in which to create a learning culture that improves based on experience, seeks best practices, and explores new approaches to creating a safer and more efficient transportation system. As Mr. Thomas stated, “we value our people as our most important asset”.

### Transportation Career Link



Launched in 2014, the goal of DART's Career Link is to create and provide learning opportunities to support employee talents, needs, and interests.

#### **Providing soft skill training and professional development training on topics such as:**

- Servant Leadership
- Making High-quality Decisions
- Coaching-for-High-Performance
- Resolving-Workplace-Conflict
- Skill & Strategies for Interviewing

Continually assessing the Agency's people training needs and providing development feedback is critical in order to reach agreement on how best to design “best in class” programming and work together in support of personal and organizational goals.

### DART Academy

## DART ACADEMY

Launched in 2014, this twelve (12) month DART Academy program was created for employees interested in developing and enhancing their skills in order to achieve advancement within their career path at DART.

#### **This is a self-paced program which individuals are reimbursed for attending classes on topics such as:**

- Time Management

- Customer Focus
- Empowerment

In addition, Communications, and Presentation classes are provided at local community colleges.

### Management DART



Launched in 2013, this twelve (12) month program provides employee development designed to non-technical skill enhancement for the current DART talent who are knowledgeable regarding their job position and have

displayed supervisory potential to manage business function and train future peers and direct reports. In collaboration and partnership with Southern Methodist University School of Business -

#### **Students receive in-depth training on:**

- Principles of Management
- Communication & Problem Solving
- Decision-Making
- Business Writing
- People Skills/Self-awareness
- Performance Improvement Planning
- Conflict Resolution and Team Building

### Multi-Agency Exchange



Launched in 2012, the (MAX) Multi-Agency Exchange program is a formal, proactive, long-term, structured leadership development and learning exchange program involving DART, RTD-Denver, and LA-Metro. Participants attend four-day study and exchange sessions hosted by each agency providing educational opportunities that enable participants to develop a deeper and broader understanding of the public transit management. The sessions are created to spark innovative ideas that may help their respective agency to accomplish its goals. The program also allows the agencies to share information learned in order to champion implementation of best practices at their agency. Participants learn from subject matter experts and see how other agencies operate differently and/or more effectively. They learn a deeper understanding of transit industry challenges and how the participating agencies seek to manage them.

### Leadership DART

Launched in 2008, Leadership DART is an executive leadership training program in partnership with SMU Cox School of Business. This employee development program is designed to provide non-technical skill enhancement for the current DART talent who display leadership potential and who strive for future leadership positions but yet need development and refinement. The program is geared towards providing a better understanding of leadership principles.



#### **Students receive in-depth training on topics such as:**

- Leadership Courage or Situational Leadership
- Marketing Strategies or Business Communication
- Project Management or Business Acumen
- Critical Thinking or Performance Management

This program is truly intended to ensure participants are prepared to take advantage of future professional opportunities that become available within the agency.

### Greater Cleveland RTA Collaboration with CSA



Innovative INboarding isn't limited to just Dallas! The Greater Cleveland RTA created a management training program through collaboration with Cleveland State University.

Together, they developed an entry-level rotational development program called the **Management Development Program (MDP)**. The program was designed to develop cross business and cross-functional expertise through rotational positions. The program provides a variety of work experiences that will help shape participants' leadership skills and overall business acumen for the transit industry.

#### **Management Development Program participants are exposed to:**

- Operations and Human Resources
- Management and Budget
- Internal Auditing
- Engineering and Project Management
- Finance and Administration
- Marketing and Communication
- Safety and Service Management
- Transportation Management (bus/rail)
- Facilities Maintenance and Fleet Management
- Operations Analysis



- Labor and Employee Relations among other departments

The MDP participant's commitment to career development, importing new skill sets, and facilitating cultural transformations is intended to develop a pipeline of new leaders for the Greater Cleveland Regional Transit Authority (GCRTA) for 2020, 2030, 2040, and beyond.

## CONCLUSION

### Call to Action - Maximizing Your Revolving Workforce!

So what we've learned is this - employers everywhere deal with their own revolving workforces. **Team People** challenges all transit employers to take ownership of a process that implements a top-down approach for initiating solid engagement and developmental strategies to help guide the rate at which people come and go in and out your organization. **Team People** also challenges all to dictate the success we all will have when we take a decided measure to invest, develop, and focus our agency's core strengths - our employees.

The process of replacing talent through the same old means of recruiting, hiring and training is a non-stop process, and for many, the practices currently used are outdated. The Millennial workforce is demanding that we change our ways. Over the next decade, employees may not stick around long enough to earn a pair of golden handcuffs. They want job satisfaction, and they want it right now!

**Team People** has presented many excellent examples; both private and public, of best practices from employers like DART, Southwest, Wegman's, Scripps, and the Container Store (to name several mentioned previously) who have implemented a deliberate approach for decelerating the revolving door. These employers are experiencing success at reducing turnover, retaining top-talent, and engaging both new and veteran employees through sound onboarding and INboarding techniques. **Team People** has outlined the virtues of proper cross-training principles and being prepared to stay resilient as an agency no matter how many key individuals may leave your organization. **Team People** has also identified both "no-cost" and "low-cost" programs that produce positive business results, including increased productivity!

This is a Call-to-Action from **Team to People** to CEO's and General Managers of transit organizations everywhere! You must start actively engaging your employees, and continually developing your workforce. It will greatly add to the overall productivity, morale, and quality of service your company provides on a daily basis. What we know to be true is this – if we don't change our mindset, and we don't change the ways in which we currently manage our talent, and if we're not flexible enough to adapt our style and approach for accommodating our employees' changing needs for growth, structure, and development, then we shall continue to

waste precious dollars contending with a rapidly revolving door of people in and out of organizations. This means losing talent which begets lost productivity, and is costly to overcome in more ways than one.

By investing in our employees, we invest in ourselves, our companies, and our industry. The proof will be in the reliability of the service we provide, the effectiveness of the operation we run, and the quality of the product we offer our customers. So **Team People** urges you to accept this call to action and maximize your workforce utilizing some of the excellent (and proven) strategies and techniques we have shared. It's your move!

# APPENDIX

## Industry Survey

Team People Ready conducted a survey of transit agencies across the United States to determine if transit agencies are seeing the revolving door of employees and what programs and strategies they have in place to prepare for turnover and improve retention. To learn more about this process, and or to request a copy of the survey information please contact one of the following “Team People members:

- Jeff Flynn, SFMTA (MUNI) → [jeffrey.flynn@sfmta.com](mailto:jeffrey.flynn@sfmta.com)
- James Bradford, St. Pete (PSTA) → [jbradford@psta.net](mailto:jbradford@psta.net)

## Methodology

The survey was prepared on surveymonkey.com and was distributed via email with a web link to the survey. The survey was distributed between May and June 2015. Survey was distributed via:

- Team People Ready members sent the link to colleagues throughout the industry
- Joe Niegowski, APTA Director of Educational Services, distributed to APTA’s Human Resources Committee
- (WSTA) Washington State Transit Association

In total, 38 transit agencies and companies across the United States responded to the full survey. Some respondents only provided partial responses and many did not opt to include contact information or company name. Respondents who provided contact information included:

- AC Transit, Oakland, CA
- BFT, Richland, WA
- Cherry Consulting of the Carolinas, Inc., Charlotte, NC
- Community Transit, Everett, WA
- COTPA, Oklahoma City, OK
- C-TRAN, Vancouver, WA
- Dallas Area Rapid Transit (DART), Dallas, TX
- Fort Worth Transportation Authority, Fort Worth, TX
- Kitsap Transit, Bremerton, WA
- Mass Transportation Authority, Flint, MI
- Metro RTA, Akron, OH
- King County Metro Transit, Seattle, WA
- PSTA, St. Petersburg, FL
- SamTrans, San Carlos, CA
- San Joaquin RTD, Stockton, CA

- SEPTA, Philadelphia, PA
- Sound Transit, Seattle, WA
- Spokane Transit, Spokane, WA
- Sun Metro, El Paso, TX
- VIA Metro, San Antonio, TX
- VTA, San Jose, CA

## Major Findings

A majority of respondents (72%) reported experiencing higher annual turnover than the national average (3.3%) however only half of respondents have systems in place to project needs and turnover emphasizing our industries lack of preparedness for turnover. Less than half of respondents also reported that they believe their companies are well positioned to cope with high turnover.

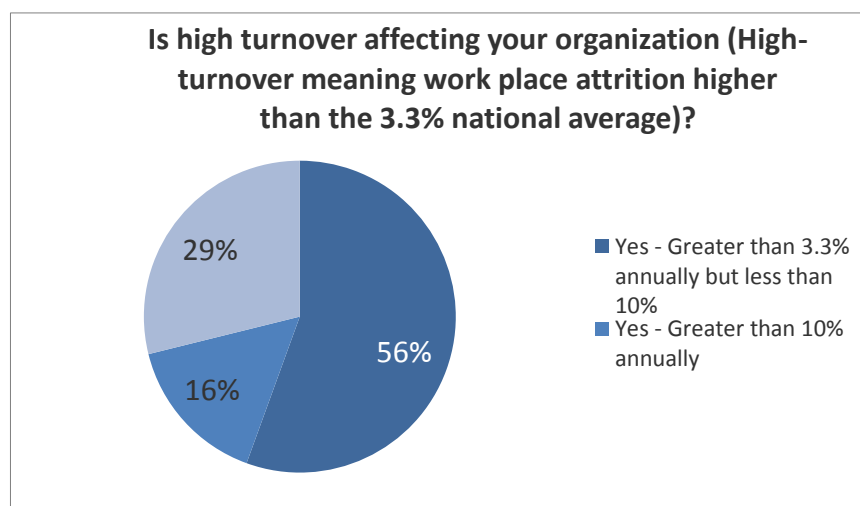
Respondents were asked a number of questions about salary and benefits and their perceived impact on attracting and retaining employees. Two-thirds of survey respondents believed that their benefits are their most effective way to attract and retain employees and two-thirds of respondents also reported that they believe their salary system in place for represented employees was effective in retaining employees. Despite these responses though, over 70% (as noted above) said they were experiencing higher than average turnover concentrated in the front line positions such as operators and mechanics. With higher turnover occurring at most companies as reported through the survey and salary and benefits packages trending to become less lucrative over time, finding new strategies to attract and retain employees beyond traditional salary and benefits programs is going to become increasingly important.

## Complete Survey Results

1. **Is high turnover across all position types affecting your organization?** (High-turnover meaning work place attrition higher than the 3.3% national average)?  
N=45

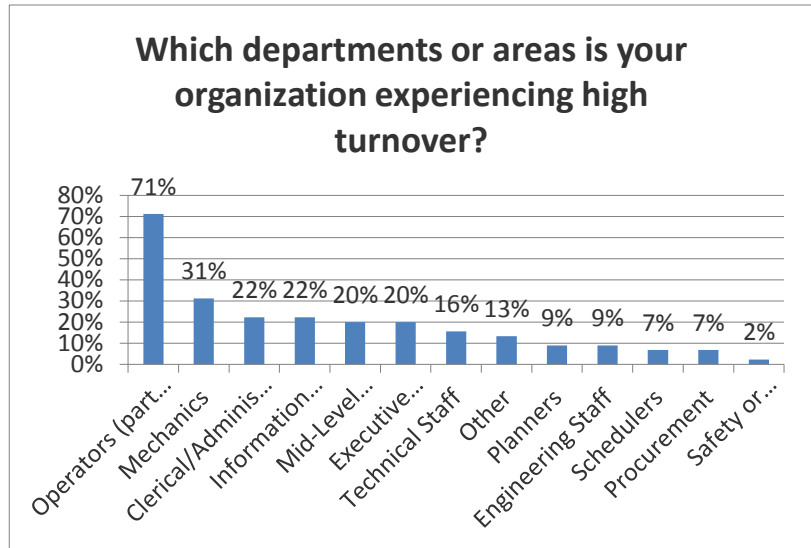
A majority of respondents (72%) stated that they are

experiencing turnover higher than the national average. Approximately 30% stated that they are experiencing lower than average turnover.



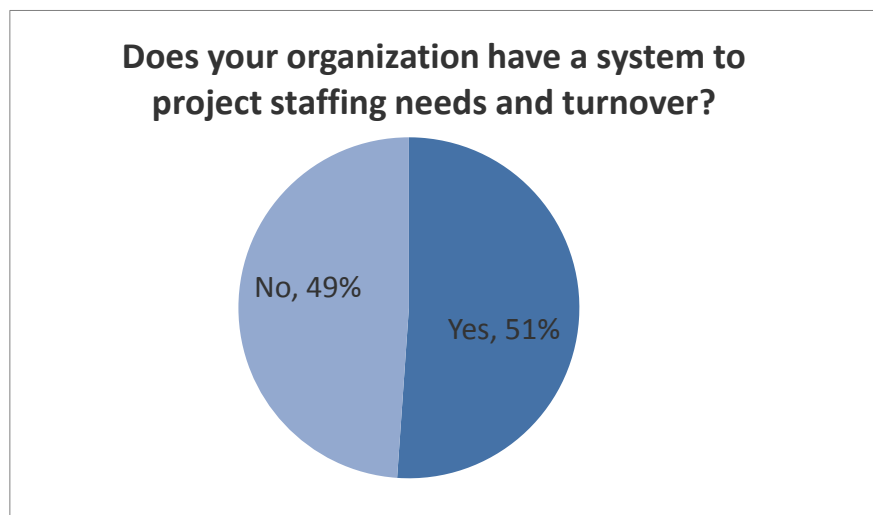
2. **Please specify which departments or areas your organization is experiencing high turnover.**  
n=45

When asked to elaborate which departments are experiencing higher turnover, a vast majority of respondents stated that operators were experiencing high turnover (71%) followed by mechanics (31% of respondents).



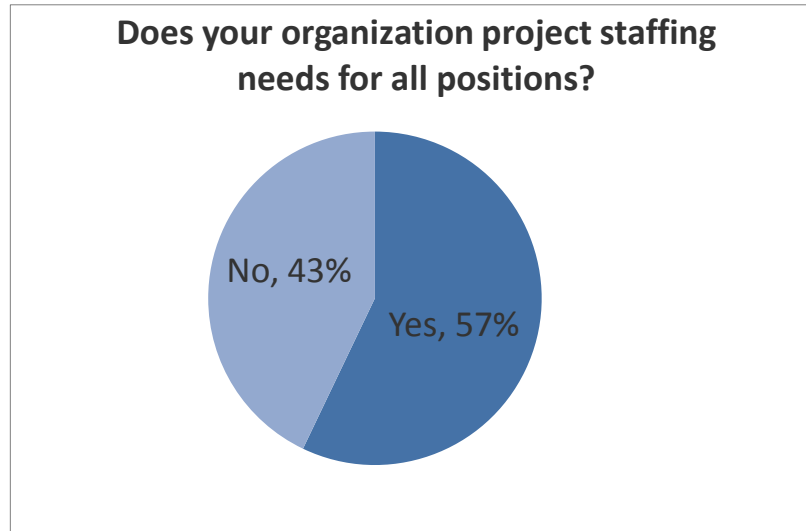
3. **Does your organization have a system to project staffing needs and turnover?** n=45

Only half of respondents stated that they have systems in place to project staffing needs and turnover. When asked to describe the systems in place, most agencies reported using spreadsheets and historic trends or retirement notices to project needs and turnover.



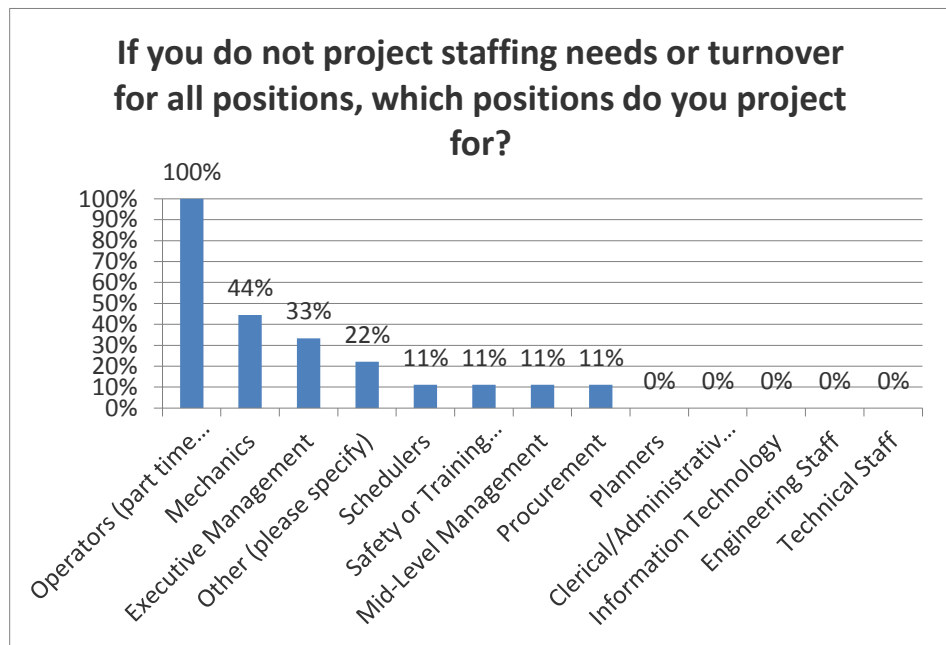
5. **Does your organization project staffing needs for all positions?** n=21

Of those who project staffing needs, most (57%) project for all positions.



6. **If you do not project staffing needs or turnover for all positions, which positions do you project for?** (Check all that apply.) n=9

For respondents who do not track for all positions, they were asked to provide information on the positions that they do track needs and turnover for. All reported tracking needs and turnover for operators.

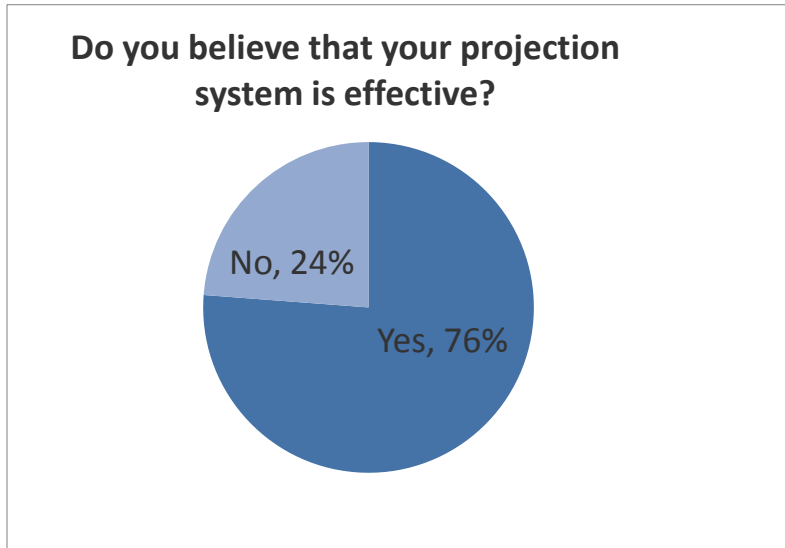


Less than half track needs and turnover for mechanics and other positions.



7. **Do you believe that your projection system is effective?** n=21

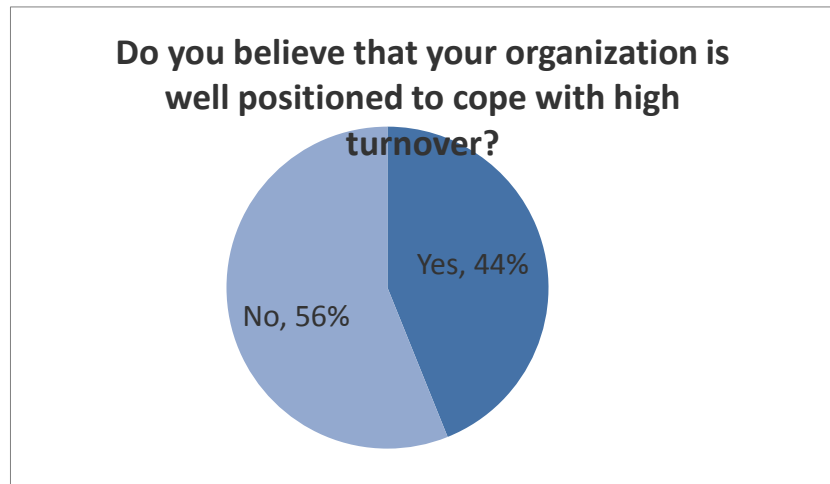
Of those with projection systems in place, three quarters believed their system was effective.



8. **Do you believe that your organization is well positioned to cope with high turnover?** n=41

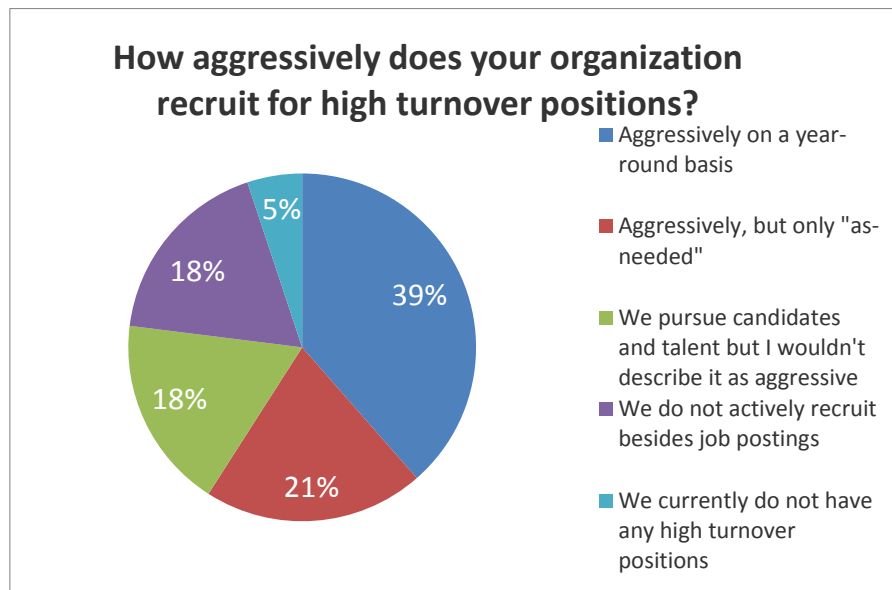
9. **If yes, what strategies do you employ to replace positions that are experiencing high turnover?** n=16

Only 44% of respondents believed their organizations were well positioned to cope with high turnover. Of those that reported that they are well positioned, they reported using strategies such as recruiters, job fairs, and keeping a large number of resumes on hand to help cope with high turnover.



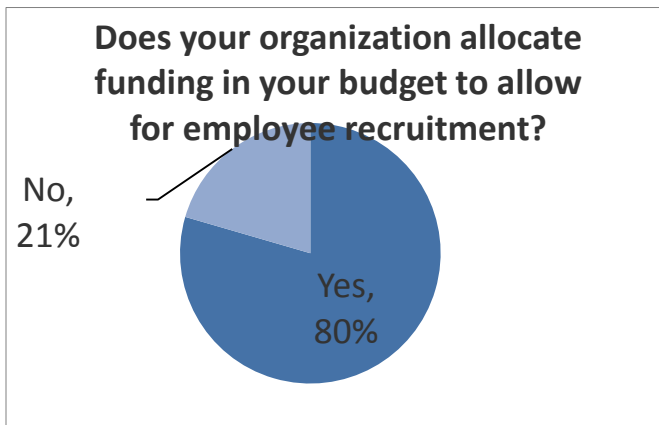
**10. How aggressively does your organization recruit for high turnover positions?**

With high turnover occurring at most respondents' companies, almost 40% responded that they are aggressively recruiting for high turnover positions on a year round basis. Less than 20% responded that they do not recruit for high turnover positions besides posting vacancies.



**11. Does your organization allocate funding in your budget to allow for employee recruitment?**

n=39



Eighty percent of respondents stated that they have budgeted funding for employee recruitment.

**12. Does your organization utilize an external recruitment firm to identify qualified candidates for your organization's vacancies?** n=39

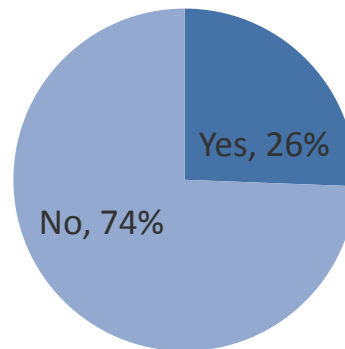
**13. If your organization uses an external recruiting firm, for what types of positions? (Check all that apply.)** n=10

14. **Do you believe that external recruiting firms find qualified candidates for your organization?**  
n=10

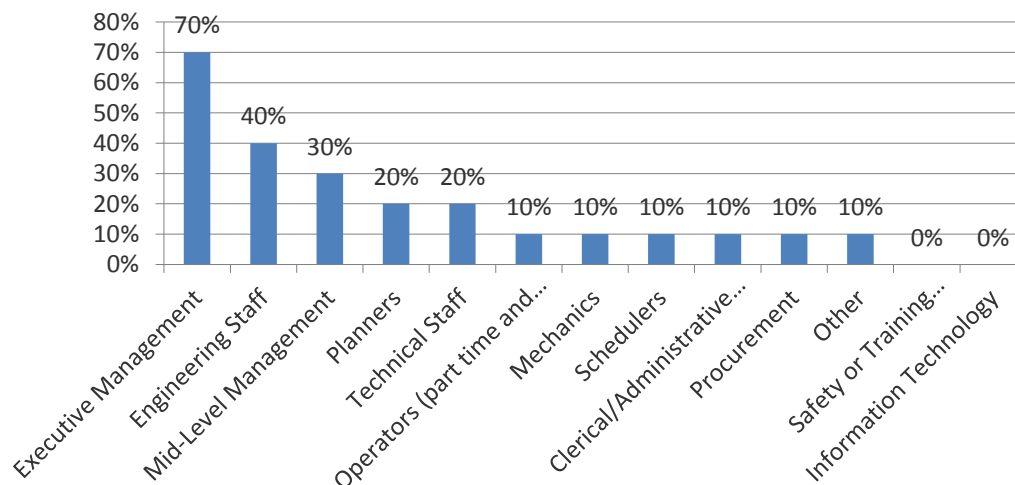
15. **Does your organization use external recruiting firms for all positions, specific positions, or those experiencing high turnover?** n=15

Only 26% of respondents use external recruiters to assist with identifying qualified candidates for vacancies. For those that use external recruiters, most used them for executive and management staff, not positions typically experiencing high turnover. Almost all respondents (90%) believed that using external recruiters was helpful in finding qualified individuals.

**Does your organization utilize an external recruitment firm to identify qualified candidates for your organization's vacancies?**

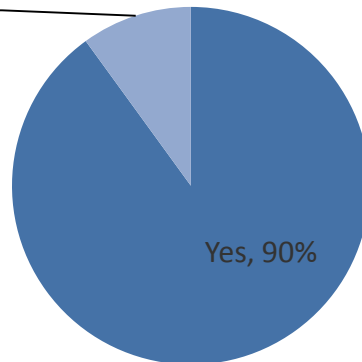


**If your organization uses an external recruiting firm, for what types of positions?**



**Do you believe that external recruiting firms find qualified candidates for your organization?**

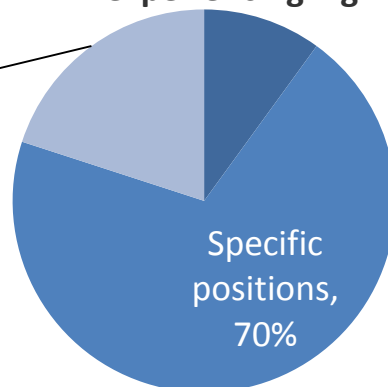
No, 10%



**Does your organization use external recruiting firms for all positions, specific positions, or those experiencing high turnover?**

High turnover positions, 20%

All positions, 10%



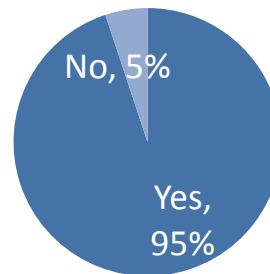
16. **Does your organization target the general population when posting new positions?** n=39

Almost all respondents (95%) do not target specific populations for new position postings and instead target the “general public”.

**Does your organization target the general population when posting new positions?**

No, 5%

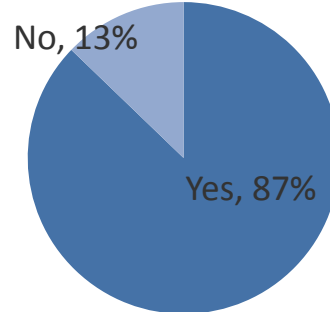
Yes, 95%



17. Does your organization target prospective candidates with a particular skill-set or background? n=17

Despite targeting the general public, 87% of respondents stated that their organizations target candidates with particular skill sets or background.

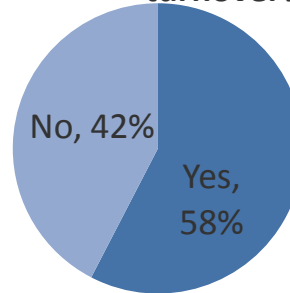
Does your organization target prospective candidates with a particular skill-set or background?



18. If your organization targets prospective candidates with a particular skill-set or background, do you find that “targeting prospective candidates” helps minimize turnover? n=33

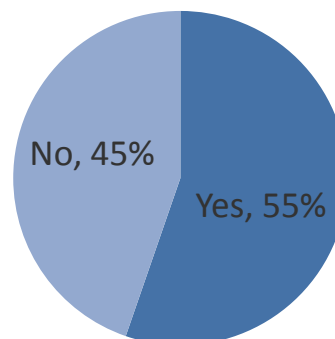
A majority of respondents (58%) believed targeting specific candidates helps minimize turnover.

If your organization targets prospective candidates with a particular skill-set or background, do you find that “targeting prospective candidates” helps minimize turnover?



19. Does your organization have a dedicated professional development staff person or department? n=38

Does your organization have a dedicated professional development staff person or department?



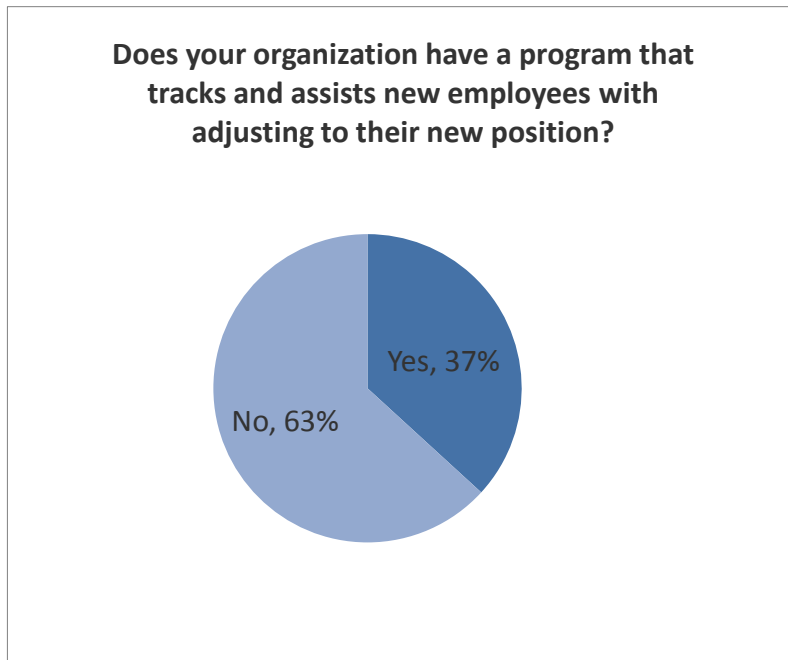
20. **If yes, can you please provide the job title or department name and a brief description or list of duties for the department or position?** n=19

A little over half of respondents (55%) reported having dedicated professional development staff. Of those that employ professional development staff, these individuals generally worked in the Training or Human Resources departments.

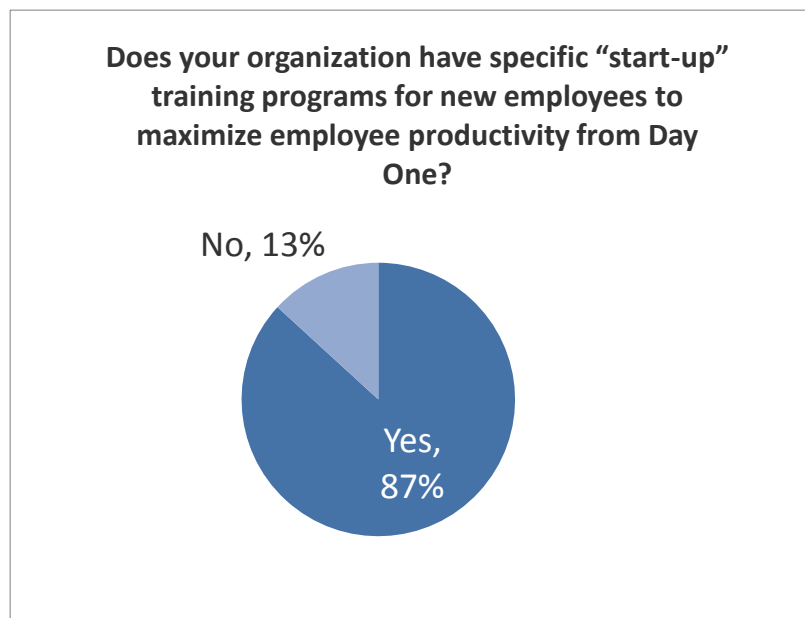
21. **Does your organization have a program that tracks and assists new employees with adjusting to their new position?**  
n=38

22. **If your organization has a program that tracks and assists new employees with adjusting to their new position.** n=10

Only 37% of respondents reported having programs in place to track and assist new employees. Of those that do have programs, respondents mentioned scheduling regular check-ins and employee orientations as programs to track and assist new employees.



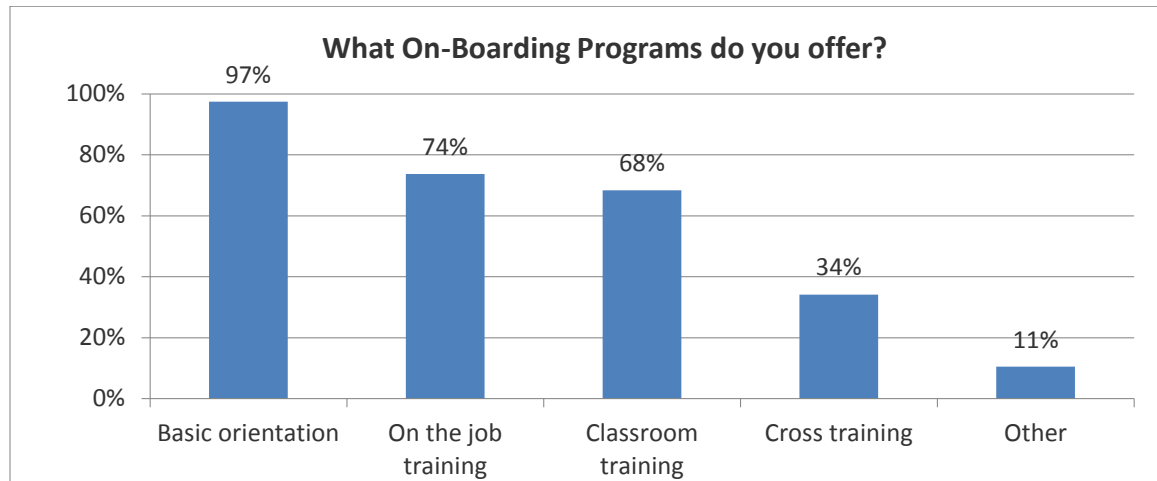
23. **Does your organization have specific “start-up” training programs for new employees to maximize employee productivity from Day One?** (Examples: Orientations, Cross-training, Classroom or Hands-on training programs.) n=38





**24. If so, what programs do you offer? n=38**

Eighty-seven percent of respondents reported having programs in place on Day One to help maximize employee productivity. These programs were largely basic orientation (97% of respondents), on the job training (74% of respondents), and classroom training (68% of respondents).

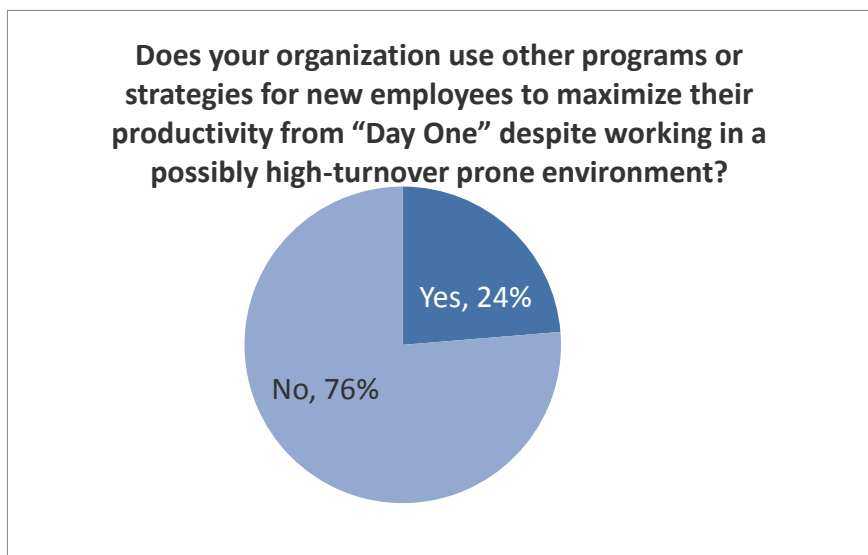


**25. Does your organization use other programs or strategies for new employees to maximize their productivity from “Day One” despite working in a possibly high-turnover prone environment? n=38**

**26. If yes, please describe other programs or strategies. n=6**

Beyond, orientation, classroom training, and on the job training, most respondents (76%) do not use any other strategies or programs to help maximize employee productivity on Day One. Of those that do have programs in place, respondents stated that they have employee assistance

programs, that they have welcome programs to help new employees feel like part of the team,



and one agency uses of a former army drill instructor to enhance new employee morale and self-esteem in adjusting to their new role.

27. **Do you believe that your organization's program is successful?** n=33

28. **If you believe your organization's program is successful, why? If it is not successful, how do you believe it could be improved?** n=24

Most (61%) respondents believed that their programs and strategies to help

improve new employee productivity are successful. When asked to explain why they believed that their programs were successful, respondents reported positive feedback from new employees, employees understood their role and expectations better because of these programs, and higher employee engagement because of these programs.

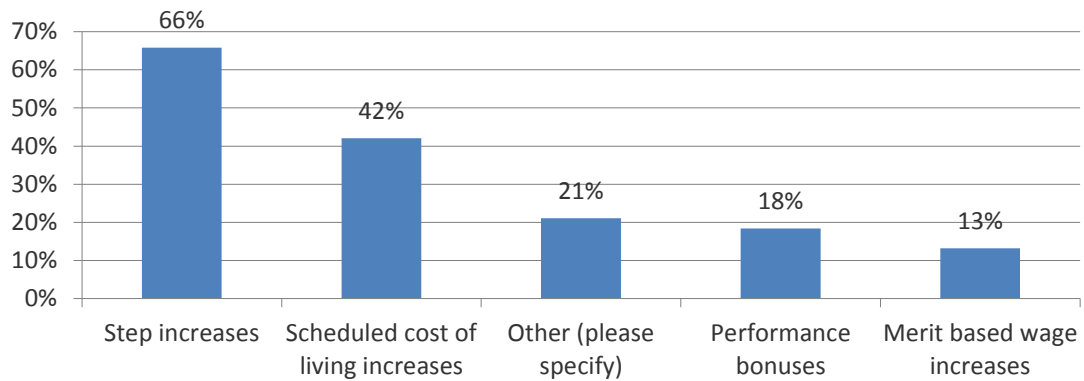


29. **What type of salary or wage increase system does your organization have for labor or union represented employees?** n=38

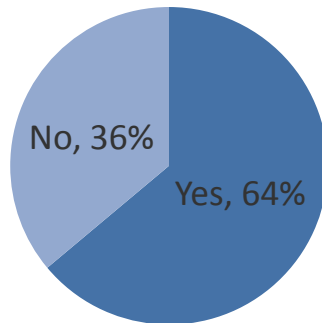
30. **Do you believe that these programs are effective in retaining labor or union represented employees?** n=36

Two-thirds of respondents have programmed step salary increases in place for represented employees and 42% have scheduled cost of living increases programmed. Other salary systems in place included attendance bonuses and bonuses related to certifications. Almost two-thirds of respondents believed that the salary system in place was effective in retaining staff.

**What type of salary or wage increase system does your organization have for labor or union represented employees?**

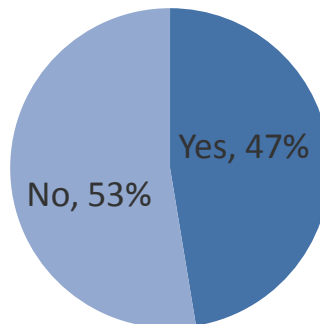


**Do you believe that these programs are effective in retaining labor or union represented employees?**



31. Does your organization have an incentive program in place for non-represented or administrative employees? n=38

**Does your organization have an incentive program in place for non-represented or administrative employees?**

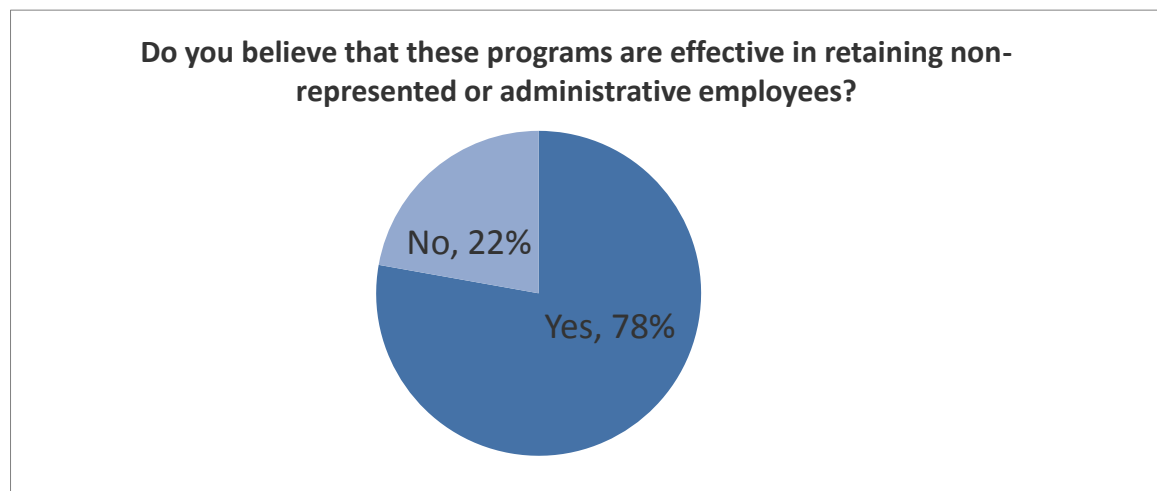
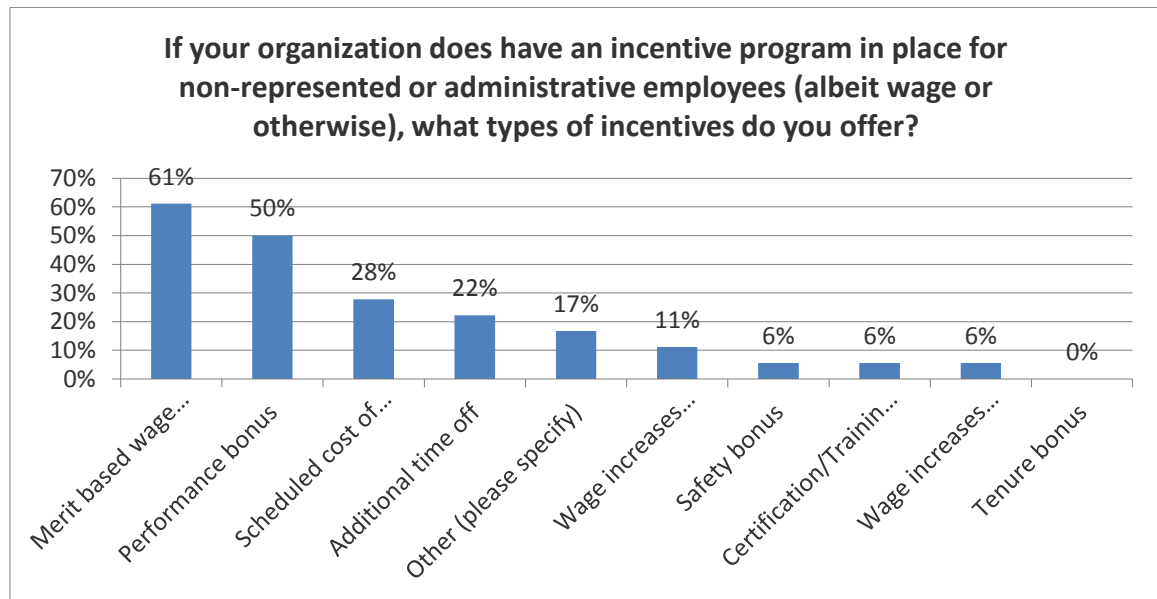


32. If your organization does have an incentive program in place for non-represented or administrative

employees (albeit wage or otherwise), what types of incentives do you offer? Check all that apply. n=18

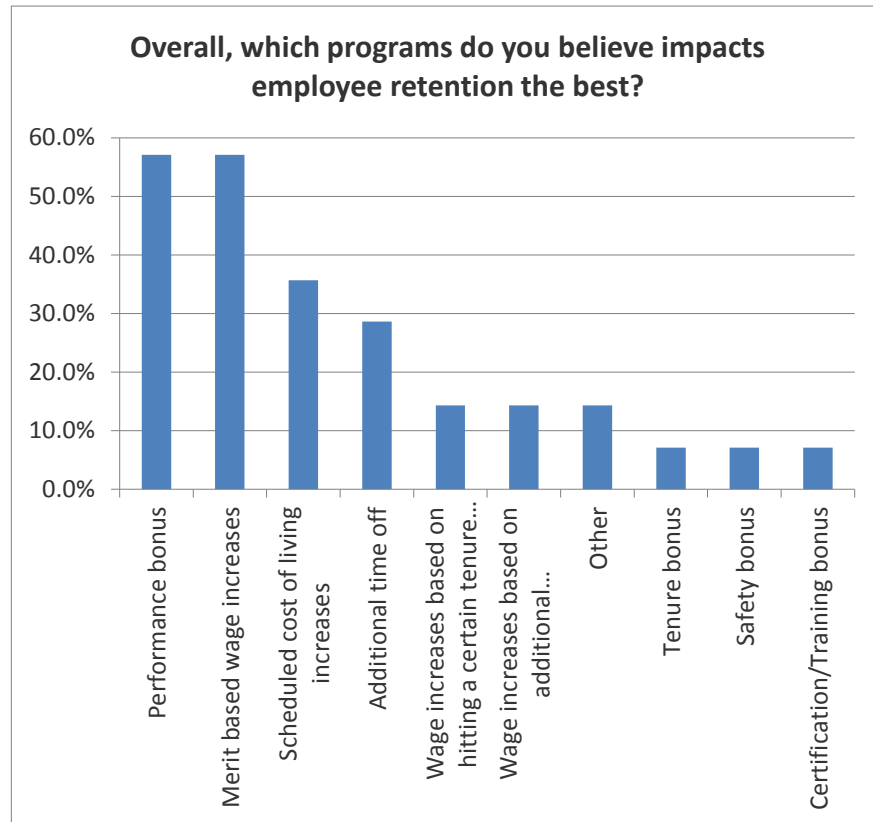
33. Do you believe that these programs are effective in retaining non-represented or administrative employees? n=18

Most respondents (53%) reported not having an incentive program in place for non-represented employees. Of those that did, 61% reported using merit-based wage increases and half reported using performance bonuses. Over three-quarters of respondents believed that these incentive programs are effective in retaining non-represented employees.



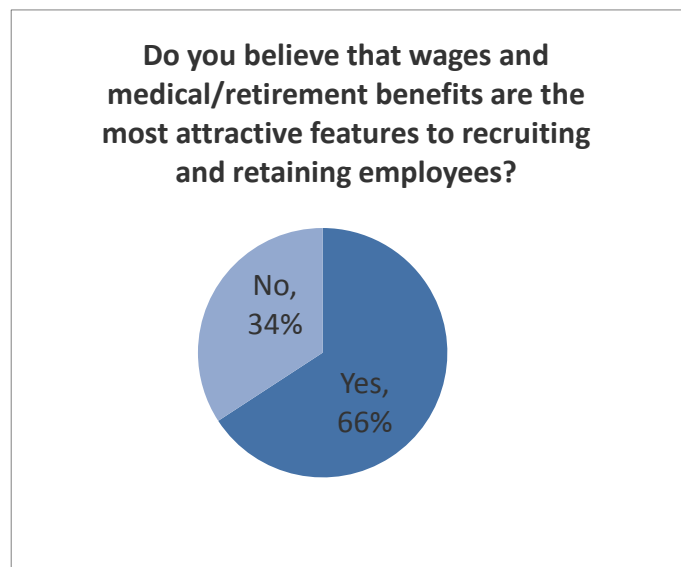
34. **Overall, which programs do you believe impacts employee retention the best?** Check all that apply. n=14

When asked which incentive programs they believed were most impactful at retaining non-represented employees, almost 60% of respondents believed that performance bonuses and merit-based wage increases were most effective.



35. **Do you believe that wages and medical/retirement benefits are the most attractive features to recruiting and retaining employees?**

Two-thirds of respondents stated that they believe that wages and benefits are the most attractive feature they have to recruiting and retaining employees. n=38



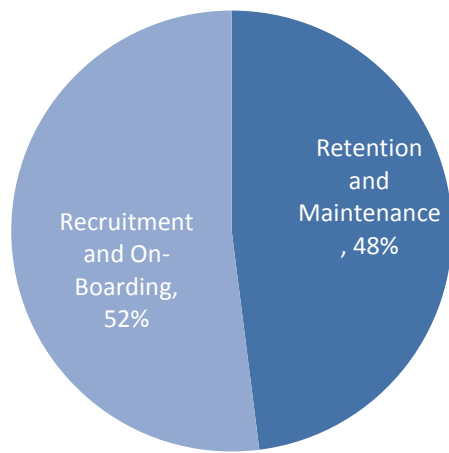
**Please comment on any other programs or best practices (not previously listed) which you also believe is very effective in helping to recruit and retain employees?**

Overall, respondents also reported that their reputation in the community, focus on the environment, training opportunities, and their mission were other “strategies” they have that help them attract and retain both represented and non-represented employees.

36. **Please comment on whether or not you or your organization concentrates more efforts on employee recruitment and on-boarding OR employee maintenance and retention?** n=25

Responses were evenly split between respondents who focus on recruitment and on-boarding and those who focus on maintaining and retaining current employees.

**Does your organization concentrate more efforts on employee recruitment and on-boarding OR employee maintenance and retention?**





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