



Philadelphia Talent Pipeline Program

Talent Acquisition & Retention Workshop (Onboarding and Retention)

Presented by: Bruce Warner
Flag Captain
bwarner@tmgva.com
757-254-2860

Date: February 7, 2023





Agenda



09:00 – Welcome/Introductions

09:15 – Talent Pipeline Program and Philadelphia Project Updates

09:30 – Community of Practice Discussion

10:15 – Best Practice Model Updates

10:30 – Break

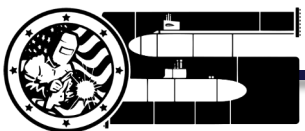
10:40 – Onboarding and Retention Session

12:00 – Working Lunch

13:00 – Onboarding and Retention Session (continued)

13:30 – Open Discussion (Issues/Available Help)

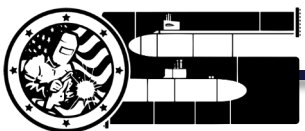
13:50 – Next Steps/Closing





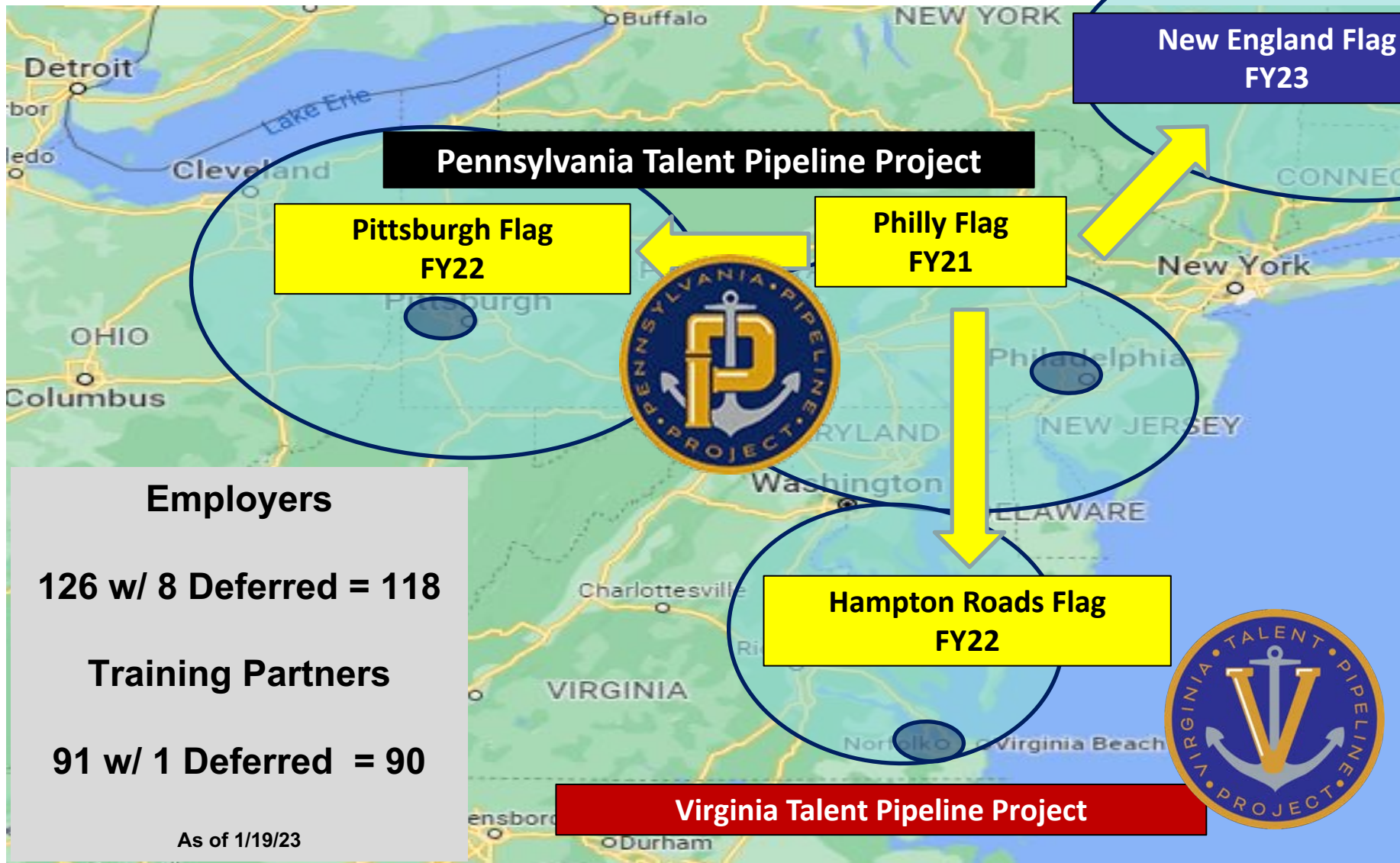
Talent Pipeline Program Update

Bruce Warner





Talent Pipeline Program



Employers

126 w/ 8 Deferred = 118

Training Partners

91 w/ 1 Deferred = 90

As of 1/19/23





2021-2023 Philly Pilot Retention Data



Total Employers at 12/1/21	36
Deferred	4
Withdrew	1
Without Accepted Offers	3
With Accepted Offers	28
# Accepted Offers	263
# Started	255
# Retained	179
# Departed	80
Retention Rate	70%

Employer Performance

100% Retention	14
Lost 1	5
Total	19/28

Talent Pipeline Performance:

CTE/Employee Referral **74%**

Training Provider Performance:

Training Provider 100% Retention	16	16
Lost 1	6	6
Total	22/27	22/27

Ave Days to Departure:	123
Ave Days in Job:	299

as of 12/31/22





Philly Cohort 2 Employer Data (2/2/2023)



	Employer	Employer Size	Performance Status	Pledge #	Trained	VSMA Complete	# Offers Made	# Offers Accepted	# Started
1	Philly Shipyard Inc. (large)	L	Performing	14	Yes	Yes	34	34	34
2	Rhoads Industries (medium)	M	Performing	12	Yes	Yes	0	0	0
3	L3 Harris – Philly (medium)	M	Performing	7	Yes	Yes	0	0	0
4	Kingsbury (medium)	M	Performing	11	Yes	Yes	4	4	4
5	NSWC (large)	L	Performing	8	Yes	Yes	12	12	12
6	NAVSUP (large)	L	Performing	2	Yes	Yes	2	1	1
7	QED Systems (small)	S	Performing	2	Yes	Yes	1	1	1
8	DC Fabricators (medium)	M	Performing	4	Yes	No	5	5	5
9	North Atlantic Ship Repair (medium)	M	Performing	2	Yes	Yes	0	0	0
10	Fairmount Automation (small)	S	Performing	2	Yes	Yes	2	2	1
11	Holtec (medium)	M	Performing	16	Yes	Yes	4	3	3
12	Metals USA (large)	L	Performing	2	Yes	Yes	4	4	4
13	NFPC (large)	L	Performing	4	Yes	Yes	0	0	0
14	York Precision Machining & Hydraulics (small)	S	Performing	1	Yes	Yes	1	1	1
15	Advanced Cooling Technologies (medium)	M	Performing	1	Yes	Yes	1	1	1
16	Grenier Industries (medium)	M	Performing	2	Yes	Yes	1	1	1
17	Cleveland Cliffs – Coatesville (medium)	M	Performing	30	Yes	Yes	0	0	0
18	Johnson Controls (medium)	M	Performing	2	Yes	Yes	1	1	1
19	PCC (large)	L	Performing	5	Yes	No	2	0	0
20	PRL (medium)	M	Performing	12	Yes	Yes	1	0	0
21	Billet Industries (small)	S	Performing	1	Yes	Yes	3	0	0
22	Lehigh Heavy Forge (medium)	M	Performing	5	Yes	Yes	15	13	13
23	Curtiss-Wright (small)	S	Performing	5	Yes	Yes	5	5	5
24	Everson Tesla (medium)	M	Performing	18	Yes	Yes	30	30	30
25	Jenkins Machine (small)	S	Performing	2	Yes	Yes	5	3	2
26	JA Moody	S	Deferred	0	Yes	No	0	0	0





Philly Cohort 2 Employer Data (2/2/2023)



	Employer	Employer Size	Performance Status	Pledge #	Trained	VSMA Complete	# Offers Made	# Offers Accepted	# Started
27	Custom Alloy (small)	S	Performing	14	Yes	Yes	14	12	12
28	Titanium Fabrication	S	Performing	2	Yes	No	0	0	0
29	Staver Hydraulics (small)	S	Performing	1	Yes	Yes	0	0	0
30	D. Gillette Industrial (small)	S	Performing	3	Yes	Yes	0	0	0
31	American Hydro (small)	S	Performing	3	Yes	Yes	1	1	0
32	Arkay Solutions (small)	S	Performing	3	Yes	No	0	0	0
33	Derbyshire Machine/DHL	S	Performing	1	Yes	No	2	0	0
34	Align Percision	M	Deferred	1	Yes	No	0	0	0
35	GAR Products	S	Improving	1	Yes	No	0	0	0
36	Weeks Marine, Inc	S	Improving	1	Yes	No	0	0	0
37	DeVal Lifecycle Support	M	Performing	1	Yes	Yes	0	0	0
38	Pennsylvania Machine Works LLC	M	Performing	12	Yes	No	8	7	7
39	Mistras Group Inc.	M	Performing	10	Yes	Yes	0	0	0
40	JGM Fabricators & Constructors	M	Performing	8	Yes	Yes	1	1	0
41	Chalmers Kubeck	M	Improving	14	Yes	Yes	0	0	0
42	Fluid Conditioning Products	S	Improving	4	Yes	Yes	0	0	0
43	Columbia Research Laboratories	S	Performing	2	Yes	Yes	3	2	2
44	Fluidyne Corporation	M	Deferred	1	Yes	No	0	0	0
45	Wolfe Tool & Machine	S	Performing	7	Yes	Yes	0	0	0
46	Beta Machine & Fabrication	S	Performing	4	Yes	Yes	1	1	1
47	Magna-Power Electronics	S	Performing	1	Yes	Yes	12	12	12
48	Bayonne Dry Dock	S	Performing	1	Yes	Yes	13	13	13
49	Mistras Group Inc. - York	S	Performing	1	Yes	Yes	0	0	0
50	NDI	S	Performing	1	Yes	Yes	1	1	1
51	BEC Machine Products	M	Deferred	3	Yes	No	0	0	0
Totals:				270	51	39	189	171	167





Philly Cohort 2 Training Provider Data (2/2/2023)



	CTE	Trained	Capacity	# Enrolled Seniors	# Screened Candidates	# Offers Received	# Accepted Offers	Status
1	Thaddeus Stevens College of Technology	Yes	150	119	118	0	0	Performing
2	Delaware County Community College	Yes	75	72	3	0	0	Performing
3	ATDM	Yes	48	45	3	2	0	Performing
4	Community College of Philadelphia	Yes	77	20	20	0	0	Performing
5	Bucks County Community College	Yes	20	16	16	10	0	Improving
6	Williamson College of the Trades	Yes	180	70	67	0	0	Improving
7	Randolph High School	Yes	72	19	18	0	0	Performing
8	Father Judge High School	Yes	24	24	24	0	0	Improving
9	Ben Franklin High School	Yes	10	11	5	3	0	Performing
10	Jules Mastbaum High School	Yes	92	41	12	2	0	Performing
11	Thomas A. Edison High School	Yes	92	29	4	0	0	Performing
12	Swenson Arts and Technical High School	Yes	72	37	48	0	0	Performing
13	SLA at Beeber	Yes	24	27	0	0	0	Performing
14	SLA High School	Yes	24	24	0	0	0	Performing
15	Kensington High School	Yes	24	9	5	0	0	Performing
16	Murrell Dobbins High School	Yes	24	7	0	0	0	Performing
17	York County Career and Technology Center	Yes	0	0	0	0	0	Improving
18	Lancaster County Career and Technology Center	No	0	0	0	0	0	Improving
19	Northampton Community College	Yes	370	370	369	0	0	Improving
20	Lehigh Career & Technical Institute	Yes	350	62	0	0	0	Performing
21	Welder Training & Testing Institute	Yes	45	37	13	3	0	Performing
22	Bethlehem Area Vocational Technical School	Yes	70	70	61	0	0	Performing





Philly Cohort 2 Training Provider Data (2/2/2023)



	CTE	Trained	Capacity	# Enrolled Seniors	# Screened Candidates	# Offers Received	# Accepted Offers	Status
23	Career Institute of Technology	No	0	0	0	0	0	Improving
24	Camden County College	Yes	469	221	172	0	0	Performing
25	Chester County Technical College High School	Yes	1000	277	17	0	0	Performing
26	Dauphin County Technical School	Yes	346	62	1	1	0	Performing
27	Lebanon County Career & Technical Center	Yes	20	20	18	0	0	Improving
28	New Oxford High School	Yes	0	0	0	0	0	Improving
29	Middlesex County Vocational & Technical Schools	Yes	30	30	30	0	0	Improving
30	Essex County Schools of Technology	Yes	0	0	0	0	0	Improving
31	Middlesex College	No	0	0	27	0	0	Improving
32	Rowan College at Burlington County	Yes	0	0	0	0	0	Improving
33	Mercy Career and Technical High School	No	0	0	0	0	0	Improving
34	Cape May County Technical School	Yes	0	0	0	0	0	Improving
35	PTTI	Yes	0	0	0	0	0	Improving
36	County College of Morris	Yes	32	16	10	0	0	Improving
37	West Side High School	No	0	0	0	0	0	Improving
38	Burlington County Institute of Technology	Yes	111	111	65	0	0	Improving
39	Universal Audenride Charter High School	Yes	0	0	0	0	0	Improving
40	Delaware County Technical High Schools	No	0	0	0	0	0	Improving
Totals:		33	3851	1846	1126	21	0	





Philadelphia Region Major Milestone Schedule 2022-2024



2022-2023 (Year 2)

July 7, 2022: New Partner (Employers, Training Provider Programs, Facilitators) Orientation

*September 13, 2022: Employer/Training Providers Program “Partnering” Program Review

October 12, 2022: Career Discovery & Project MFG Welding Competition Event

*January 24, 2023: Recruiting & New Hire Retention Program Review

March 7, 2023: Recruiting and Hiring Fair (Burlington County Institute of Technology, Westampton Campus)

*May 4, 2023: Employer-New Hire 1st Year Anniversary Recognition & “Signing Day” Ceremony

2023-2024 (Year 3)

July 10, 2023: New Partner (Employers, Training Provider Programs, Facilitators) Orientation

*September 13, 2023: Employer/Training Providers Program Kick Off, Partnering, and New Hire Retention Update Program Review

October 25, 2023: Career Discovery & Project MFG Welding Competition Event

*January 23, 2024: Recruiting & New Hire Retention Program Review

March 20, 2024: Recruiting and Hiring Event

*May 18, 2024: Employer-New Hire 1st Year Anniversary Recognition & “Signing Day” Ceremony

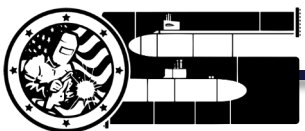
* Major Milestone





Building a Community of Practice

Sylvie Gallier Howard





COMMUNITY OF PRACTICE EXERCISE

At your tables, take 5 minutes and write:

- On pink sticky notes: What is not going well for recruitment (REC), hiring (HIR) and retention (RET)?
- On green stick notes, What is going well?

(Include “REC”, “HIR” or “RET” on your notes.)

COMMUNITY OF PRACTICE EXERCISE

Next, go around the table and share

- Your current retention numbers/percentage
- Your 2023 hiring goal
- Progress so far on hiring
- Share out your red sticky notes

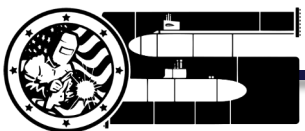
Go back around the table and share your green sticky notes.

Table Spokesperson Share out:

- **1 example of a successful practice**
- **How employers can support each other as a community of practice**



Best Practice Model Updates



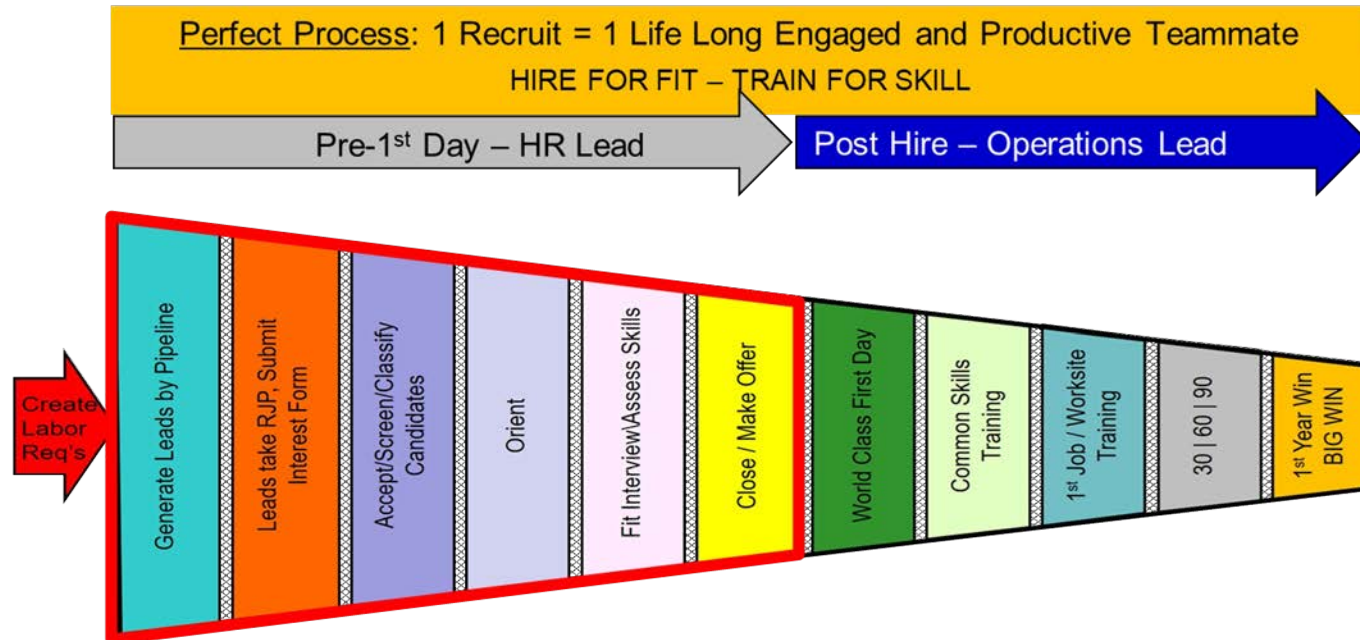


Best Practice Employer Partners



- Kingsbury
- Fairlead
- Cleveland Cliffs
- Advex
- AT&F

— Each employer agreed to redesign their TA&R system using the Best Practice Model





Kingsbury December 2022



Months	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
Beginning Headcount	114	110	111	113	117	122	124	124	122	122	122	
Total Hires	0	3	3	5	6	3	2	1	2	2	0	27
Total Terminations	4	2	1	1	1	1	2	3	2	2	1	20
Ending Headcount	110	111	113	117	122	124	124	122	122	122	121	7
Demand	3	2	3	4	5	7	7	8	8	12	1	60
# RJP Views	24	90	1775	1167	1155	474	114	703	387	1369	2648	9906
# Interested	42	68	82	41	71	68	74	74	84	107	53	764
# Invited to RD / Invited to Interview	7	12	14	6	8	10	11	16	23	16	11	134
# Scheduled and/or Attended RD / Interview	5	9	15	6	3	9	14	9	26	15	16	127
# Interviewed	5	9	15	6	5	8	13	8	24	13	16	122
# Conditional Offers	3	1	6	7	0	4	1	3	3	3	5	36
# of Offers Accepted	3	1	6	6	1	4	1	2	2	2	5	33
# Attended Kingsbury First Day	0	3	3	5	6	3	2	1	2	2	0	27
# Completed Week 1	0	3	3	5	5	3	2	1	2	2	0	26
# 30 Days	0	3	3	5	5	3	2	1	2	2	0	26
# 60 Days	0	3	3	5	4	3	2	1	2	1	0	24
# 90 Days	0	3	3	4	4	3	1	1	0	0	0	19
# 180 Days	0	3	3	3	4	1	0	0	0	0	0	14
# Retained 1 Year	0	0	0	0	0	0	0	0	0	0	0	0

Total Still Active 19

Feb 1 – Dec 31	Filter Effectiveness	Feb 1 – Dec 31	Retention Rate
Total RJP Views	9906	Total Hires	27
Attended WCFD	27	Still Active	19
Effectiveness %	.27%	Retention %	70%



Talent Acquisition & Retention

Best Practice Model – Kingsbury

- Process - How Kingsbury's using the TA&R Tools
- Monthly Scorecards
- 5th Metric Scorecard – Planning & Visibility
- Lessons Learned
- Aligning with Strategic & Long-Range Planning



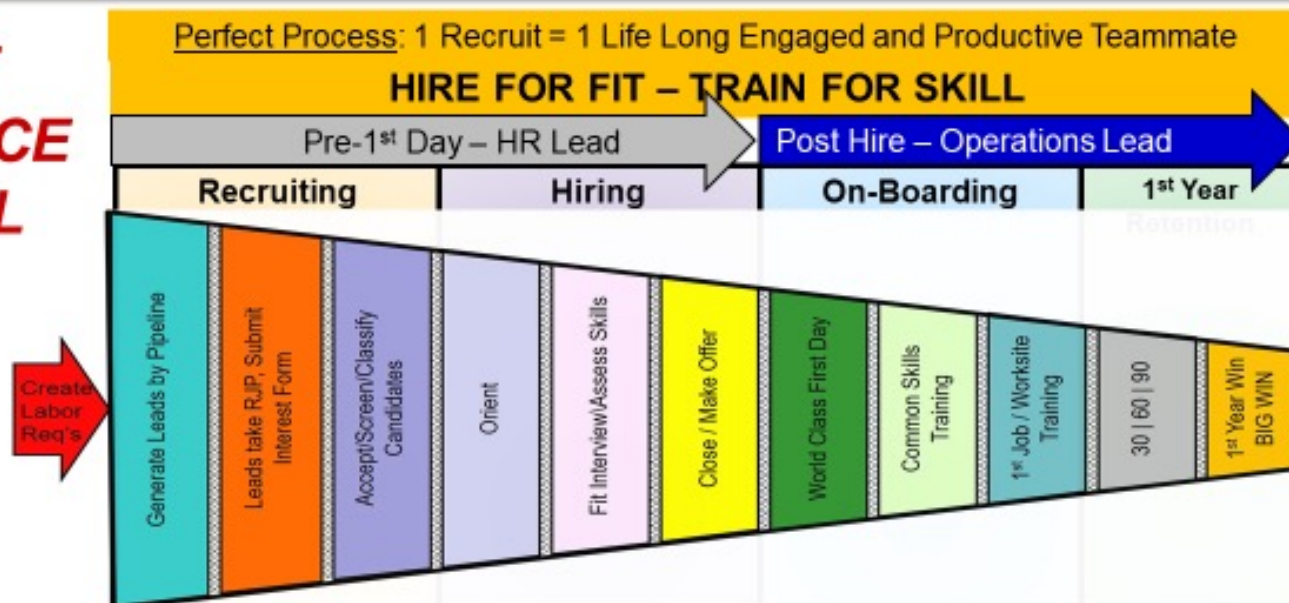


Demand Driven Talent Acquisition & Retention (TA&R) System



Last Updated:
JAN 30, 2023

**BEST
PRACTICE
MODEL**



Pipelines		Tools	
1. Training Providers (CTE Programs, etc.)	6. Temp Agencies	1. TA&R Value Stream Mapping and Performance Improvement Plan Development	6. World Class First Day
2. Employee Referral Program	7. Social Media	2. Realistic Job Preview & Candidate Tracking System	7. Common Skills Training
3. Accelerated Training in Defense Manufacturing	8. Recruiting Agencies	3. Recruiter Training	8. Leader Training
4. College Departures	9. Military & Veterans	4. Recruiting & Offer Day/New Hire Orientation	9. 30-60-90 day & 1 Year Fit/Skills Assessment
5. Adult Education	10. Employment Commissions	5. Behavioral Based "Fit" Interviews	10. 5th Metric "People" Scorecard Data Driven Program Management System
	11. Recovered/Returns		
	12. Retiree's		



Kingsbury, Inc.

Social Media & Recruiting Strategies



PRESENTED BY:

Megan, Jamie, Heidi, Paisleigh, Lindsey

OUR TEAM

Josephine Klink
*Human Resources
Generalist - Corporate*



Jamie Krueger
*Human Resources
Manager - Oshkosh*



Lindsey Reiter
*Talent Acquisition
Coordinator - Oshkosh*



Megan McCall
*Corporate Manager of
Human Resources*



Sue Raucheisen
Human Resources Assistant

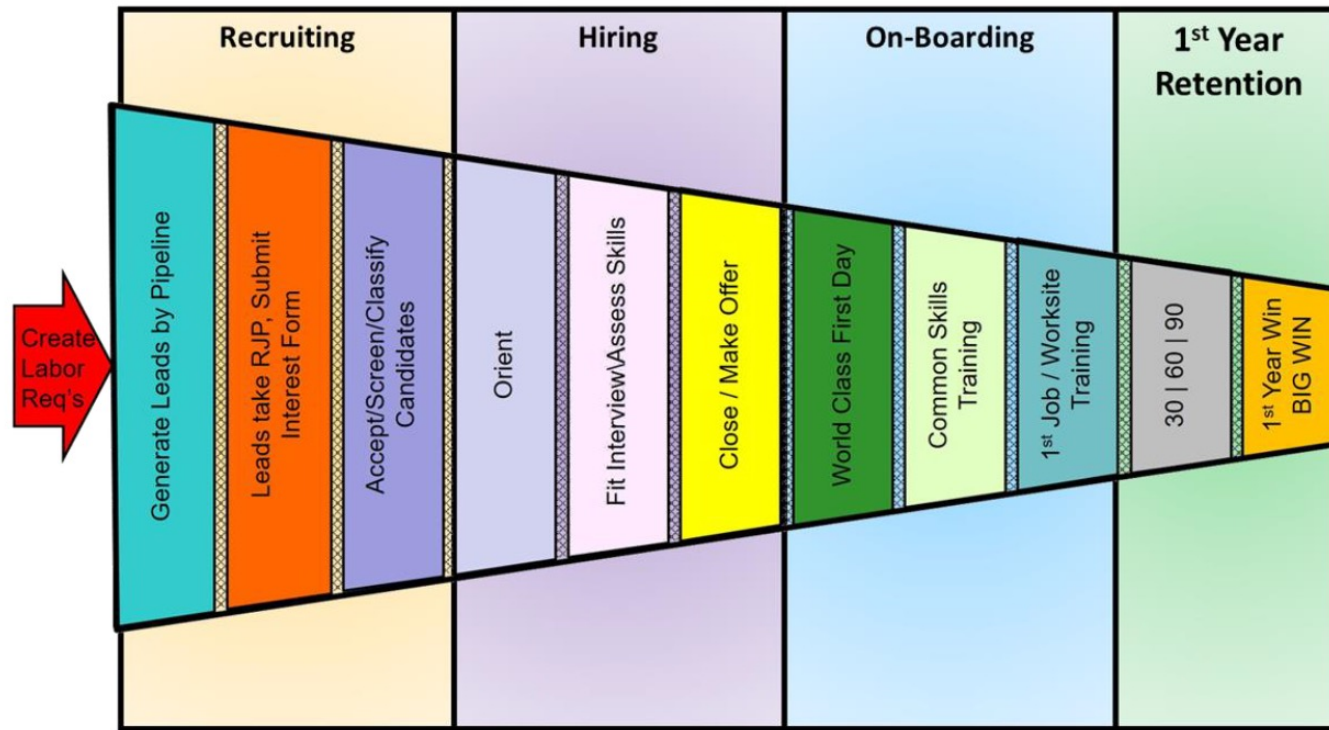


Heidi Ekstrom
Corporate Recruiter



Paisleigh Pelot
*Human Resources
Generalist - Oshkosh*

Talent Acquisition & Retention Model



3



Hiring Strategically

- Employment Markets are Competitive
- Strategically align HR Practices to business needs
- Keeping people informed
- Active vs. Passive Recruitment

4

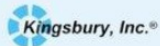


KINGSBURY, INC. IS NOW HIRING!

Ready for an exciting new opportunity with fantastic benefits?

Kingsbury is looking for people LIKE YOU for:

- LEADERSHIP & MANAGEMENT POSITIONS
- PROFESSIONAL & OFFICE POSITIONS
- MACHINISTS



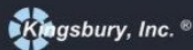
To learn more,
check out our Realistic
Job Preview



KINGSBURY, INC. NOW HIRING

Ready for an exciting new opportunity with an industry leader in bearing technology?
Kingsbury, Inc. is now hiring at our Oshkosh facility.

**WE ARE ADDING TEAM MEMBERS TO OUR CNC MACHINING CREW.
ALSO, PACKAGING, MAINTENANCE, AND LEADERSHIP TEAMS.**



Visit us at
www.kingsbury.com
or scan the code!



Passive Recruiting Practices

- Posting to Job Boards
 - Indeed, CareerBuilder, LinkedIn, Practical Machinist
 - Handshake
 - Summer Mechanical Engineer Intern Position
- Realistic Job Preview (RJP)
- Digital Ads
- Mailers
- Attend local job fairs and community events

5

Active Recruiting Practices

- **Creating Pipelines**
- **Building connections with Career Technical Education schools, local high schools and colleges**
 - Internships, youth apprenticeships, and summer help opportunities
 - Access to Alumni resources
- **Apprenticeship Program**
- **Resume Search**
- **Targeting Candidates**
- **Previously Applied Candidates**



6

Walk-In Wednesday

Active Recruiting

Walk-In Wednesday was born out of collaboration at the 1st quarterly check and adjust meeting in Oshkosh (2022).

One of the major gaps was the visibility to our business and the importance of showing the Kingsbury processes.

Our Success Rate

- At the start of April 2022, Oshkosh had 27 total job openings
- We had a total of 19 Walk-In Wednesday attendees
- 12 offers were made
- 11 jobs remained open after Walk-In Wednesday



Engagement Enhancements



- **Increased communication between hiring managers, supervisors and the Talent Acquisition Team**
 - *Asking the right questions*
 - *What does the ideal candidate look like?*
- **Hiring for fit, training for skill**
- **Aptitude and Hands-On Assessments**
- **Recruiting Day**
- **World Class First Day**

8

**Considering a change?
Consider Kingsbury!**

- Paid Time Off Starting Day 1
- Generous Benefit Options
 - Company paid benefits including Dental & Vision
- 13 Paid Holidays
- Tuition Reimbursement
and so much more!



<https://realisticjobpreview.com/kingsbury>

Take a look at our opportunities!



10385 Drummond Rd.
Philadelphia, PA 19154
PH: 215.824.4000



Referred By: _____

Referral Program

- **\$1,000 Referral Bonus**
 - Implemented in 2021
- **12 team members hired from employee referrals**
- **April 2022 Referral Incentive Program**
- **Internal Recruiting Cards**

Social Media

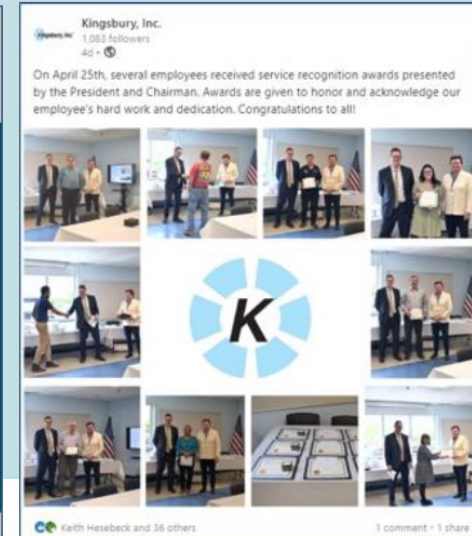
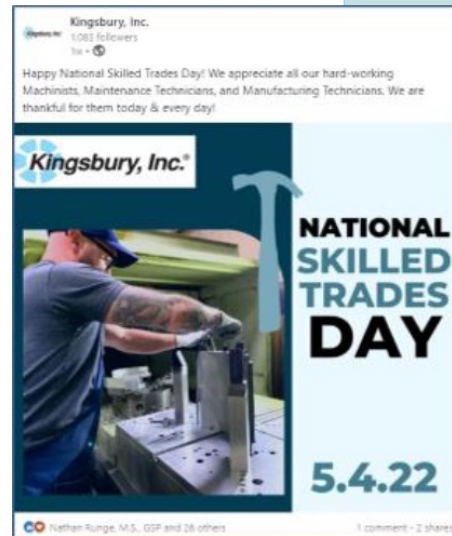
- 2 posts / per week
- Increased engagement and awareness
- Various types of content



- Targeting Top Talent



- Walk-In Wednesday Ads



Diversity & Inclusion

- **Circa**
 - *OFCCP HR Solution that streamlines diverse recruiting efforts by posting to state job boards and other organizations*
- **RecruitMilitary Career Fair**
 - *Exclusive to military veterans, transitioning military, and military spouses*
- **Veteran Ready Employer Award**



Talent Acquisition & Retention

Best Practice Model – Kingsbury

- Process - How Kingsbury's using the TA&R Tools
- Monthly Scorecards
- 5th Metric Scorecard – Planning & Visibility
- Lessons Learned
- Aligning with Strategic & Long-Range Planning





Kingsbury December 2022



Months	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total	
Beginning Headcount	114	110	111	113	117	122	124	124	122	122	122	122	
Total Hires	0	3	3	5	6	3	2	1	2	2	0	27	
Total Terminations	4	2	1	1	1	1	2	3	2	2	1	20	
Ending Headcount	110	111	113	117	122	124	124	122	122	122	121	7	
Demand	0	3	5	0	11	0	0	11	0	0	0	30	
# RJP Views	24	90	1775	1167	1155	474	114	703	387	1369	2648	9906	
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# Scheduled and/or Attended RD / Interview	5	9	15	6	3	9	14	9	26	15	16	127	
# Interviewed	5	9	15	6	5	8	13	8	24	13	16	122	
# Conditional Offers	3	1	6	7	0	4	1	3	3	3	5	36	
# of Offers Accepted	3	1	6	6	1	4	1	2	2	2	5	33	
# Attended Kingsbury First Day	0	3	3	5	6	3	2	1	2	2	0	27	
# Completed Week 1	0	3	3	5	5	3	2	1	2	2	0	26	
# 30 Days	0	3	3	5	5	3	2	1	2	2	0	26	
# 60 Days	0	3	3	5	4	3	2	1	2	1	0	24	
# 90 Days	0	3	3	4	4	3	1	1	0	0	0	19	
# 180 Days	0	3	3	3	4	1	0	0	0	0	0	14	
# Retained 1 Year	0	0	0	0	0	0	0	0	0	0	0	0	
												Total Still Active	19



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5th Metric Scorecard Kickoff – Q3 2022

- The 5th metric scorecard is utilized as a retention and succession planning tool
- The 5th metric scorecard captures the department's results including existing personnel, new hire metrics, and expected demand
- The expectation of this tool:
 - Measures starting metrics
 - Measures ending metrics
 - Measures new hire metrics
 - Measures expected demand for up to 5 years

5th Metric Scorecard				
Quarter: 1st		Leader: Megan McCall		
Team Snapshot				
Metric		Value		
Total Headcount Start Number from the End of Last Qtr.		10		
Minus the Number of Teammates Who Departed		1		
Plus the Number of New Teammates		2		
Total Head Count End		11		
Number of Open Positions		3		
Expected Demand in 1-year		2		
Expected Demand in 5-years (including upcoming retirees, etc)		1		
New Hire Snapshot				
Total New Hires (Less than 1 Year)		1		
Needs Supervision (#)		1		
Works Independently (#)		0		
Can Teach Others (#)		0		
Names of Teammates Who Departed	Date/Reason	Names of New Teammates	30/60/90 Complete?	Start Date
Holly Smith	8/15/2022 - Voluntary resignation	Jack Daniels	Yes	15-Sep-22
		Joe Brown	Yes	10/15/2022

30/60/90

- 30/60/90 Introductory Reviews
- Located: Intranet > Employee Human Resources > HR Standard Forms
- Distributed by Jotform: https://form.jotform.com/Kingsbury_HR/306090Review

Conducting the 5th Metric Scorecard

- HR will distribute the department's headcount (starting, ending, new hire, and retirement age) to the office managers and shop foreman supervisors in the beginning of each quarter.
- The scorecard will first be completed by the office managers and the shop foreman supervisors.
- The office managers and shop foreman supervisors will complete this scorecard and give it to the department head/executive at least two weeks before the reoccurring quarterly review meeting.
- The department head/executive will convert their department's scorecards onto one scorecard (which should include the office managers and shop foreman supervisors).
- The department head/executive will present the final scorecard to the president and HR at the quarterly review meeting.

Q3 - 5th Metric Scorecard – Phila & Yuba City

5th Metric Scorecard			
2022 - 3rd (July-September)		Leader: Philadelphia/Yuba Cumulative	
Team Snapshot			
Metric		Value	
Total Headcount Start Number from the End of Last Qtr.		120	
Minus the Number of Teammates Who Departed		3	
Plus the Number of New Teammates		5	
Total Head Count End		122	
Number of Open Positions		7	
Expected Demand in 1-year		21	
Expected Demand in 5-years (including upcoming retirees, etc)		37	
New Hire Snapshot			
Total New Hires (Less than 1 Year)		16	
Needs Supervision (#)		8	
Works Independently (#)		7	
Can Teach Others (#)		5	
Names/Position (Hired, Needed, or Departed Team Members)	Hired, Need, or Depart Date	30/60/90 Complete?	Comments: Why Departed, When/Why Future Demand, etc.
HR Supervisor			Open Position
Traffic Associate			Expected Demand 1 yr-Phila- Continue Succession plan
Developer			Expected Demand 2 yr-Phila- Continue Succession plan
IT			Expected Demand 5 yr-Osh- New succession plan opportunity
Stehpanie Gallagher (Burcz)	4/25/2022		New Hire
Jamie Krueger	12/13/2021		New Hire
Lindsay Reiter	3/22/2022		New Hire
Machnist A			Top Grading
Hazel Benedict	Hired	Y	Performing well
Amadei, Shawn R	HIRED 8/8/2022	30	Material Mover, added to cover 2023 retirement
Scutt, Julio	TERM 9/9/2022		No show, over 3 consecutive work days (Group 1 L)
McNellis, Michael B	HIRED 9/19/2022		CNC Operator, replacment for retirement
Santiago, Danny M	HIRED 8/22/2022	30	CNC Operator, added to cover 2023 retirement
Leva, Valerie	HIRED 7/25/2022		Buyer
Assembler	ASAP		General assembly support needed
CNC Machinist	ASAP		2nd shift openings
SUPERVISOR	ASAP		Replacement for John K. planning to retire in 2023

Q3 - 5th Metric Scorecard – Oshkosh

5th Metric Scorecard			
2022 - 3rd (July-September)		Leader: Oshkosh	
Team Snapshot			
Metric			Value
Total Headcount Start Number from the End of Last Qtr.			115
Minus the Number of Teammates Who Departed			7
Plus the Number of New Teammates			8
Total Head Count End			116
Number of Open Positions			2
Expected Demand in 1-year			8
Expected Demand in 5-years (including upcoming retirees, etc)			12
New Hire Snapshot			
Total New Hires (Less than 1 Year)			28
Needs Supervision (#)			18
Works Independently (#)			2
Can Teach Others (#)			8
Names/Position (Hired, Needed, or Departed Team Members)	Hired, Need, or Depart Date	30/60/90 Complete?	Comments: Why Departed, When/Why Future Demand, etc.
Lisa Williams			Transferred to Materials department
Shop support technician			Backfill team member departing Q4
Dave Lux			Expected to retire late 2023
Bob Gaab			May retire in next 5 years
Ken Fuhrman			May retire in next 5 years
QC Intern	1		Future QC Projects
QC Inspector	1		Future part of work force
Weinberger, Joshua R	11/10/2022 (Departed)		Let go for attendance inconsistencies
Paulson, Dylan R	8/17/2022 (Departed)		Summer Help, Termed for no call/ no show
Justine Parker	6/13/2022	Hired before 30,60,90 implemented	New Hire
Keane Dement	7/6/2022	Hired before 30,60,90 implemented	New Hire
Timothy Arnott	7/11/2022	Hired before 30,60,90 implemented	New Hire
Seawell, Matthew	8/8/2022	Hired before 30,60,90 implemented	New Hire
Snobel, Hunter	7/25/2022	Hired before 30,60,90 implemented	New Hire
Charlie Metko	8/22/2022	Hired before 30,60,90 implemented	New Hire
Meng Hang	7/11/2022	Hired before 30,60,90 implemented	New Hire

Q4 - 5th Metric Scorecard (Talent Analysis)

Talent Analysis				
2023 Fourth Quarter		Leader: Mike Brawley		
Team Snapshot				
Metric				Value
Total Headcount Start Number from the End of Last Qtr.				10
Number of Team members Who Departed				1
Number of New Teammates				1
Total Head Count End				10
Number of Open Positions				0
Expected Demand in 1-year				1
Expected Demand in 1-5-years (including upcoming retirees, etc)				2
New Hire Snapshot-(Less than one year)				
Total New Hires (Less than 1 Year)				3
Performing Far Above Expectations (#)				2
Meets Expectations (#)				1
Does not meet expectations (#)				0
Names (Hired, Needed, or Departed Team Members)	Job Title	Hired, Need, or Depart Date	30/60/90 Complete?	Comments: Why Departed, When/Why Future Demand, Why the team member does not meet expectations. etc.
Derek Phillips	Director, Philadelphia Manufacturing	12/22/2022		Recruited for a VP role (significant promotion) by non-industry, non-competitor. Succession plan was utilized for internal coverage of the open position.
Needed	Project Manager	Jan-23	N/A	Jerry Vogt (Part Time, retired) cross-training for Navy project management required assuming a steady reduction in hours for Mr. Vogt. Megan McCall transferred into this position in January, 2023.

Q4 - 5th Metric Scorecard (Talent Analysis)

Talent Analysis Summary									
4th Q 2022	Executive Team	Shared Services	Engineering	Sales	Manufacturing	Quality/CI	Yuba City	Oshkosh	Totals
Team Snapshot									
Metric									
Total Headcount Start Number from the End of Last Qtr.	10	20	19	14	48	9	7	115	242
Number of Team members Who Departed	1	0	1	0	1	0	0	4	7
Number of New Teammates	1	1	0	1	1	0	0	3	7
Total Head Count End	10	21	18	15	48	9	7	114	242
Number of Open Positions	0	1		0	4	1	2	3	11
Expected Demand in 1-year	1	2	3	3	12	3	0	2	26
Expected Demand in 1-5-years (including upcoming retirees, etc)	2	1	3	4	23	3	0	11	47
New Hire Snapshot-(Less than one year)									
Total New Hires (Less than 1 Year)	3	6	3	2	7	1	0	28	50

Talent Acquisition & Retention

Best Practice Model – Kingsbury

- Process - How Kingsbury's using the TA&R Tools
- Monthly Scorecards
- 5th Metric Scorecard – Planning & Visibility
- Lessons Learned
- Aligning with Strategic & Long-Range Planning



Talent Acquisition & Succession Planning

I. Succession Planning Process

Purpose:

To ensure the enterprise maintains organizational and strategic addresses the short-term (or emergency) and long-term success positions.

Scope:

The scope includes Executive, Divisional, and Departmental Lead positions and individuals identified by Leadership as, "High Pot

Process Overview:

Annually, Human Resources will compile succession-related data CEO and Senior Leaders to facilitate the creation or update of su positions. The need-basis will be prioritized based on years-to-r available, any employee-offered deviations from standard retire

Priority 1	5 years or less
Priority 2	6 to 10 years
Priority 3	11 to 15 years
Priority 4	16 or more years

The CEO will evaluate the Executive, Director, and Plant leadership positions. The leaders of Corporate Departments and Plants will review succession needs and planning for Middle Management, Mission Critical, and employees identified as "High Potential" with HR and the CEO.

The following guidelines shall govern this process:

- a. An emergency or short-term back up and potential long-term successor(s) will be identified.
- b. If a vacancy is pending within 5 years, a formal development plan is to be created. The plan will be a collaborative effort between the incumbent and the successor, HR to assist as needed.
- c. Beyond 5 years, a development plan is encouraged but at the discretion of the leader. For executive level positions, a development plan is strongly recommended regardless of "priority."



2022 Succession Plan

Company Confidential



Enabling Superior Machine Performance Through Expert Bearing Solutions



Talent Acquisition & Succession Planning

Middle Management Positions							
>>> Kingsbury GmbH							
Position	Incumbent	Years to Retirement*	Priority Level	Emergency Back-up	Potential Long-Term Successor(s)	Time to Develop	DP in Place
Production Manager, Kingsbury GmbH	Paul Siebrecht	1	1	Alexander Frank	Alexander Frank External Fill (New Foreman #1)		Yes
Quality Manager	Frank Sanz	4	1	Alexander Frank	(New Foreman #2)		
Engineering Manager	Reinhard Beneke	15	3	Morched Medhioub	TBD		

Mission Critical Positions							
>>> Philadelphia Manufacturing Division							
Position	Incumbent	Years to Retirement*	Priority Level	Emergency Back-up	Potential Long-Term Successor(s)	Time to Develop	DP in Place
Manufacturing Engineer	Benz Babecki	5	1	Bill Ives John Krezel	External Fill		
Production Scheduler	Chris Suriani	15	3	DeeAnn McCollum Harry Geiger	External Fill		
Repair Coordinator	Mike Dobson	3	1	Doug Tuley Eric Shields	Eric Shields Jay Moore		

Talent Acquisition & Retention

Lessons Learned

- Hiring is NOT an HR Problem!
- Build or adopt a Process, follow it, improve it
- Hire for Fit! Know who you are!
- Data, Metrics, Rhythm (Rockefeller Habits) – Use these TA&R tools
- CTE Relationships
 - Early & In Person
 - Invite Students, Visit Students – let them talk to recent hires
- Include Leaders (Supervisors and Staff Level) in Recruiting
- Retention is a Leadership Obligation!
 - Leadership MUST drive this bus!
- Onboarding is only the start
 - Training, Career Pathing, Communication
 - *For Kingsbury, this is where we have a lot to work on*



Fairlead December 2022



Months	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total	
Beginning Headcount	301	302	309	308	315	322	318	321	316	312	321		
Total Hires	8	14	15	11	19	5	13	9	5	14	2	115	
Total Terminations	7	7	16	4	12	9	10	14	9	5	15	108	
Ending Headcount	302	309	308	315	322	318	321	316	312	321	308	7	
Demand	9	9	10	11	19	19	14	8	16	10	12	137	
# RJP Views	136	132	105	101	113	97	135	105	150	89	52	1215	
# Interested	98	114	79	80	79	75	99	65	99	66	39	893	
# Invited to RD / Interview	20	73	40	30	10	22	26	23	33	16	3	296	
# Attended RD / Interview	20	65	20	29	4	22	26	23	33	15	3	260	
# Interviewed	20	63	20	29	4	22	26	23	33	15	3	258	
# Conditional Offers	8	25	13	11	20	5	13	9	5	14	2	125	
# of Offers Accepted	8	21	13	11	19	5	13	9	5	14	2	120	
# Attended Fairlead First Day	8	14	15	11	19	5	13	9	5	14	2	115	
# Completed Week 1	8	14	15	11	19	5	13	9	5	14	2	115	
# 30 Days	7	13	14	11	18	5	13	9	4			94	
# 60 Days	7	12	13	10	16	5	12	7	4			86	
# 90 Days	7	10	13	10	15	5	11	7				78	
# 180 Days	7	8	12	9	13							49	
# Retained 1 Year												0	
												Total Still Active	92

Feb 1 – Dec 31	Filter Effectiveness	Feb 1 – Dec 31	Retention Rate
Total RJP Views	1215	Total Hires	115
Attended WCFD	115	Still Active	92
Effectiveness %	9%	Retention %	80%





Cleveland Cliffs – Coatesville Scorecard



Months	2022	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
Beginning Headcount	553	579												
Total Hires	26													
Total Terminations	0													
Ending Headcount	579													
Demand		0	0	2	5	0	0	0	0	0	0	0	0	7
# RJP Views														0
# Interested														0
# Invited to RD / Invited to Interview														0
# Scheduled and/or Attended RD / Interview														0
# Interviewed														0
# Conditional Offers														0
# of Offers Accepted														0
# Attended Kingsbury First Day														0
# Completed Week 1														0
# 30 Days														0
# 60 Days														0
# 90 Days														0
# 180 Days														0
# Retained 1 Year														0
													Retained	
Pipelines Using														
1. CTE Programs (HS & CC)									1. TA&R VSM/PIP	Complete			6. World Class First Day	Mar
2. Employee Referral Program									2. Realistic Job Preview &	Feb			7. Common Skills Training	Feb
6. Social Media									3. Recruiting Training	Feb			8. Leader New Hire Retention	Complete
8. Military & Veterans									4. Recruiting & Offer Day/New	Mar			9. 30-60-90 day & 1 Year	Apr
									5. Behavioral Based "Fit"	Feb			10. 5th Metric "People"	Complete

Feb 1 – Dec 31	Filter Effectiveness	Feb 1 – Dec 31	Retention Rate
Total RJP Views	0	Total Hires	0
Attended WCFD	0	Still Active	0
Effectiveness %	0%	Retention %	0%





Plan of Action & Milestones



November 2022:

- 15 Nov – 5th Metric Scorecard Training
- 16 Nov – Forecast Data Collection/RJP Data Collection/Pipeline Selection

Note: Monthly Program Reviews will be the second or third Wednesday of every month starting in December.

January 2023:

- Complete RJP Layout Review/Design Recruiting Day/Develop Behavioral Based Interviews
- Collect 5th Metric Report
- 18 Jan – Program Review w/5th Metric Report

February 2023:

- RJP Beta Review & Go Live/Finalize Recruiting Day Script & Schedule/Design WCFD/Review Business 101

- 11 Feb – Recruiting Day (Class 1)
- 14 Feb – Rehearse WCFD/Finalize Business 101
- 15 Feb – Program Review w/5th Metric Report

March 2023:

- 6 Mar – WCFD (Class 1)
- 7 Mar – Finalize 30-60-90 day Performance Eval
- 15 Mar – Program Review w/5th Metric Report (Time TBD)
- 18 Mar – Recruiting Day (Class 2)

April 2023:

- 3 Apr – WCFD (Class 2)
- 19 Apr – Program Review w/5th Metric Report
- 22 Apr – Recruiting Day (Class 3)





Plan of Action & Milestones - Continued



May 2023:

6 May – Signing Day

8 May – WCFD (Class 3)

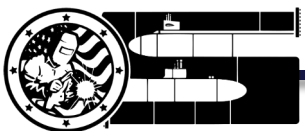
17 May – Program Review w/5th Metric Report

June 2023:

28 June – Best Practice Model Report Out

July 2023 – June 2024

Monthly Reporting on Hiring and Retention

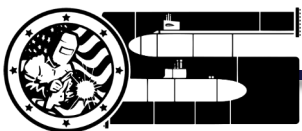




Cleveland Cliffs – Coatesville BPM Insights



- **Is much more complex than just a hiring exercise**
- **Requires an entire Team, not just an HR function**
- **If applicable, must bring corporate in early**





Advex - BPM Insights



- **Initially didn't understand that total demand for 2023 did not just include the 9 adds to the headcount.**
 - Total demand includes total add to current headcount plus projected attrition
 - Must be data driven
- **This program has been running smoothly because from the top down, everyone is onboard and participating**





AT&F Cleveland Production Team Scorecard



CLEVELAND PRODUCTION TEAM SCORECARD

MONTHS	2019	2020	2021	2022	DEC 22	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL			
Beginning Headcount	109	105	105	106	110	109													219		
Total New Team Members	44	50	53	53	4	10													14		
Total Terminations	47	49	52	50	5	7													12		
End Headcount	105	105	106	109	109	112													221		
METRICS					DEC 22	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL			
Open Positions (Demand)					21	21															
RJP Views					0	232													232		
Interested (Submitted Forms)					52	32													84	36%	% RJP Viewers Interested
Invited to RD/Interview					28	73													101	120%	% Of Interested invited to interview
Attended RD/Interview					16	67													83	82%	% of invited that showed for interview
Interviewed (passed to LMA)					7	19													26	31%	% fully interviewed
Conditional Offers					5	11													16	62%	% of interviewed given offers
Offers Accepted					4	11													15	94%	% of offers accepted
Attended First Day					4	4													8	53%	% of accepted that attended 1st day
Completed Week 1					4	4													8	100%	% retained 1 Week
30 Days					0														0	0%	% retained 30 days
60 Days																			0	0%	% retained 60 days
90 Days																			0	0%	% retained 90 days
180 Days																			0	0%	% retained 180 days
Retained 1 Year																			0	0%	% retained 1 Year
Still Active:																		4			





Plan of Action & Milestones



Sep 2022

- Realistic Job Preview
- Execute Alpha Review**
- CTE and Veteran Pipelines
- Develop and begin mining
- Leadership Retention Training Workshop**

October 2022

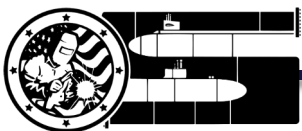
- Realistic Job Preview
- Continue Development
- CTE and Veteran Pipelines
- Continue development and mining
- Standardize Closing (Recruiting Day)
- Conduct analysis and begin development
- 5th Metric Scorecard
- Develop and Finalize

November 2022

- Monthly Program Review #1**
- 5th Metric Scorecard
- Train and Coach
- Realistic Job Preview
- Conduct Beta Review and Test
- CTE and Veteran Pipelines
- Continue development and mining

December 2022

- 5th Metric Scorecard
- Training & Coach
- Realistic Job Preview
- Track and make adjustments
- CTE and Veteran Pipelines
- Track and make adjustments
- Standardize Closing (Recruiting Day)
- Development
- World Class First Day
- Development





Plan of Action & Milestones



January 2023

- Realistic Job Preview
 - Track and make adjustments
- CTE and Veteran Pipelines
 - Track and make adjustments
- Standardize Closing (Recruiting Day)
 - Development
- World Class First Day
 - Develop
- 5th Metric Scorecard
 - Track and Coach
- 5th Metric Scorecard Meeting #1**
- Monthly Program Review #3**

February 2023

- Realistic Job Preview
 - Track and make adjustments
- CTE and Veteran Pipelines
 - Sustain, track and make adjustments
- Standardize Closing (Recruiting Day)
 - Alpha Review/Beta Review**
- World Class First Day
 - Develop

- 5th Metric Scorecard
 - Track and Coach
- AT&F Scorecard Meeting #2
- Monthly Program Review #4

March 2023

- Realistic Job Preview
 - Track and make adjustments
- CTE and Veteran Pipelines
 - Track and make adjustments
- Standardize Closing (Recruiting Day)
 - Make adjustments and finalize
- Continued assessment
- World Class First Day
 - Trial Run
- Track and make adjustments
- 5th Metric Scorecard
 - Sustain, track and Coach
- 5th Metric Scorecard Meeting #4
- Monthly Program Review #5

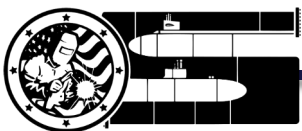




Best Practice Representative



- What about the Legacy TA&R system were causing your organization the most churn?
- What was the level of ownership/buy-in across the organization with your Legacy TA&R system?
- How have you incorporated the Best Practice TA&R model?
- What have you seen as the biggest changes within your organization by incorporating the Best Practice TA&R model?
- What have you learned from this process?
- How is it helping you be a better company?

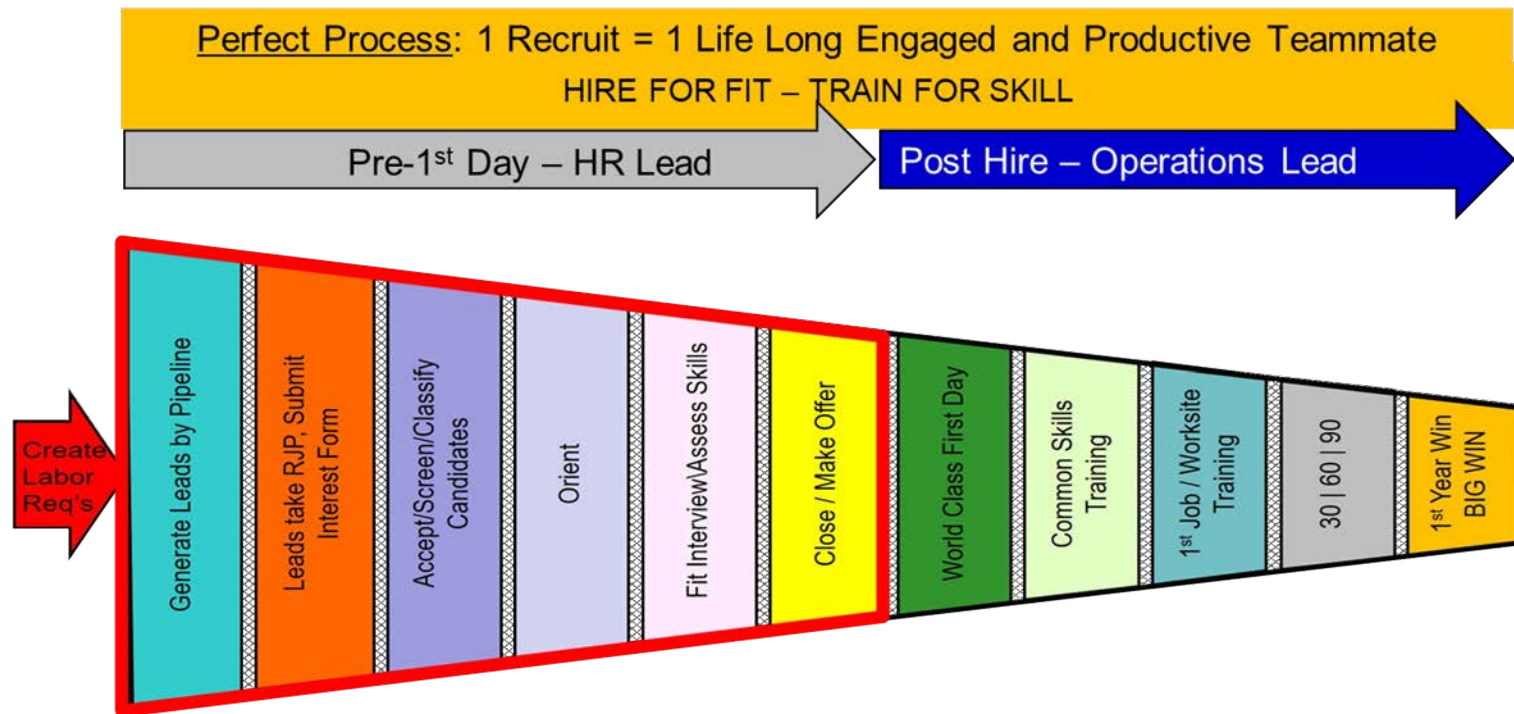




Best Practice Summary Assessment



- Data speaks volume's – you just have to listen.
- The process works – you just have to follow it.
- The more leadership is involved, the greater likelihood of success.

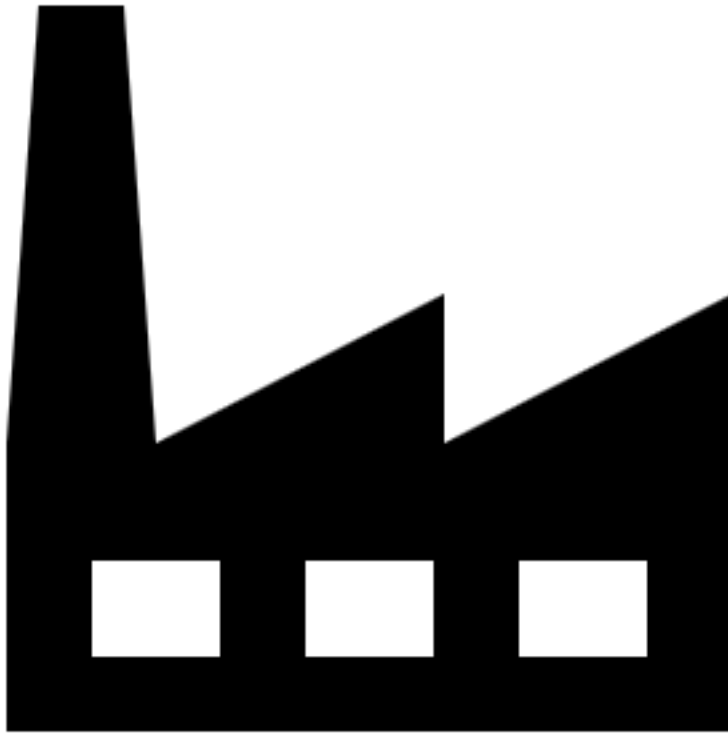




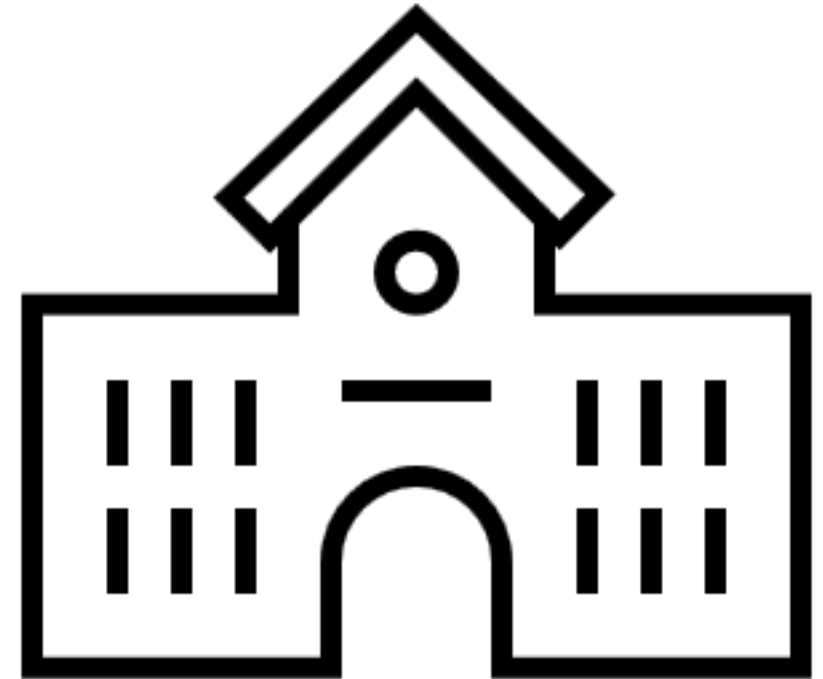
How's It Going?



EMPLOYERS



TRAINING PROVIDERS

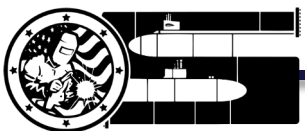






Onboarding and Retention Session

Bruce Warner/Bo Brewer/Kamisha Wyatt





Workshop Objectives



TLO: Identify and Understand Onboarding and Retention Process and Best Practices

ELOs:

- **Identify Principles of a High-Performing Team (Bruce)**
- **Identify the Best Practice Onboarding Process Steps (Bo)**
- **Identify Training Provider Student Prep for 1st Job Process Steps (Kamisha)**
- **Understand Training Provider Student First Job Preparation (Kamisha)**
- **Clarifying Expectations and Building Trust (Bo)**
- **Describe the Best Practice process steps of Retention (Bruce)**
- **Talent Pipeline Reporting Requirements (Bruce)**

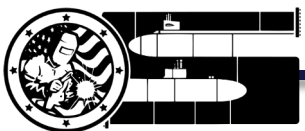




ELO: Principles of a High Performing Team

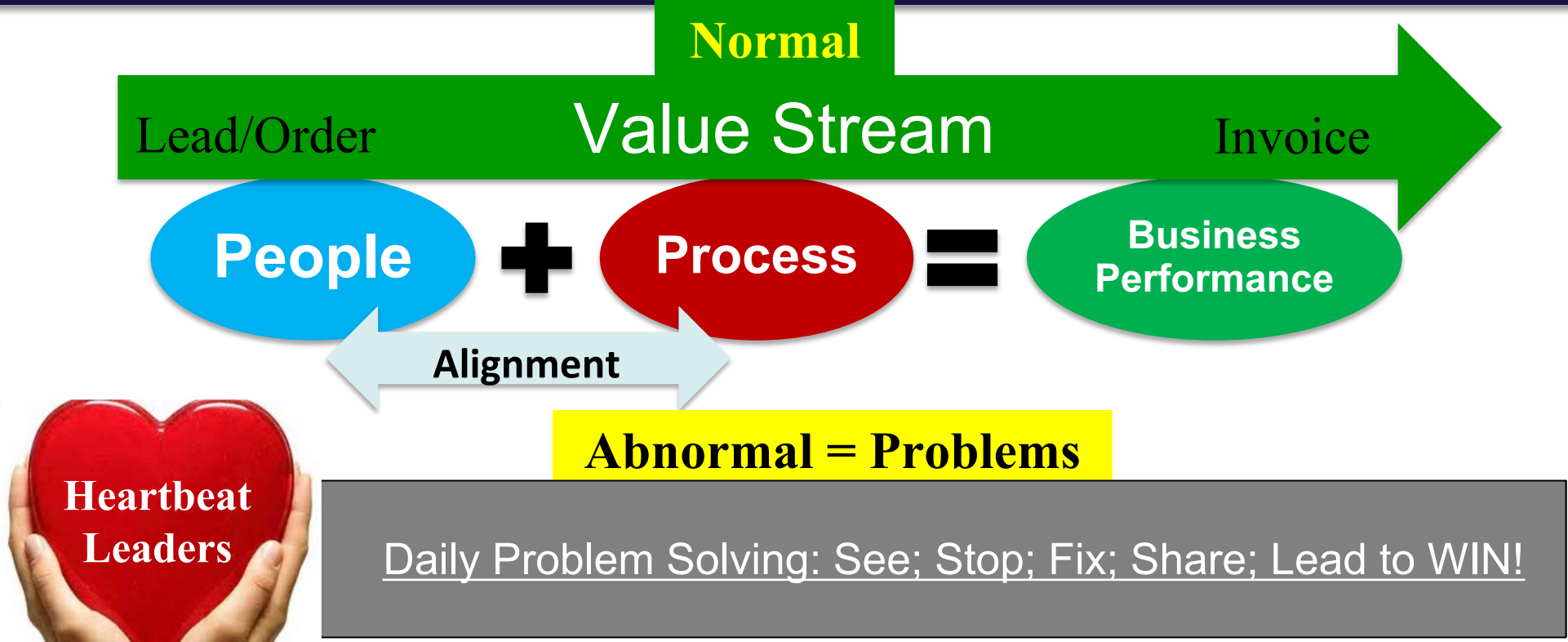


- **Building a High-Performance Team**
- **Heartbeat Leaders First**

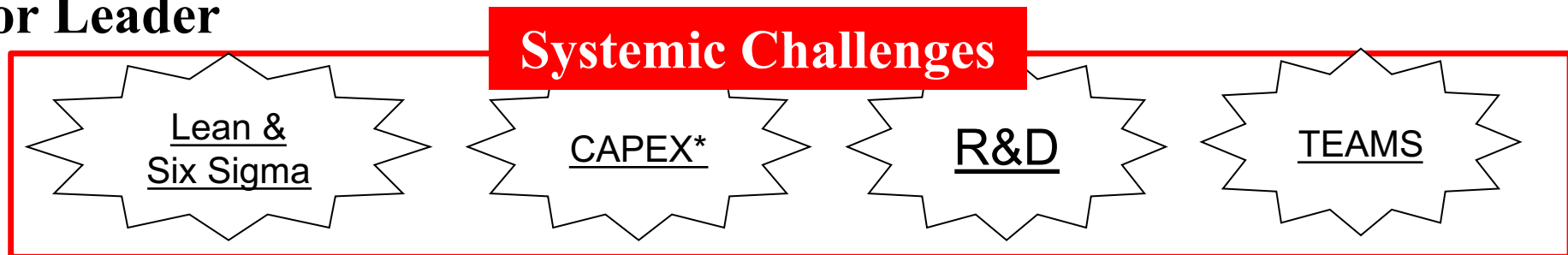




The Strategy



The Senior Leader Tool Kit



*Capital Expense





Post-COVID Trends and Observations



- **“Tribal Knowledge” vs. “Data Driven” Decision Making**
 - **Arrogance or Ignorance**
- **Whiplash Effect drives break in Company – Employee Trust**
- **Overtime Out of Control**
- **High Turnover in New Hires**
- **Increased Demand for Workforce**
 - **More External Opportunities**
 - **Voluntary Retirements due to Aging of the Workforce**
 - **“Retired on the Job” driving Labor Costs Up and stifling High Potential Advancement with decreasing productivity and engagement**



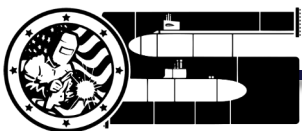


Post-COVID Trends and Observations



- **Significant Increase in Customer Demands**
- **More Projects than Time, People, and Resources Available**
- **Senior Leadership Tactical focus creating Leader “Compression”**
- **“Heroic Efforts” creating exhausted, de-moralized, and under performing Heartbeat Leaders**

- **What else are you seeing????**

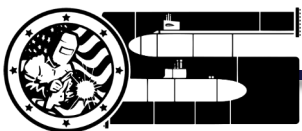




Leader Compression

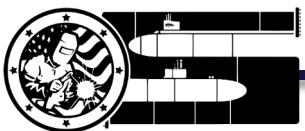


- **When more than one Leader level is working the same problem simultaneously.**
- **The Boss always Wins!**
- **The Subordinate Leader Loses...**
- **The Team is confused**
- **We are killing alligators at a high rate of speed!**
- **But...Who is draining the swamp?**





**Are you running Your Business?
or
Is Your Business Running You?**

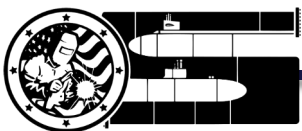




ELO: Onboarding Best Practice Process Steps



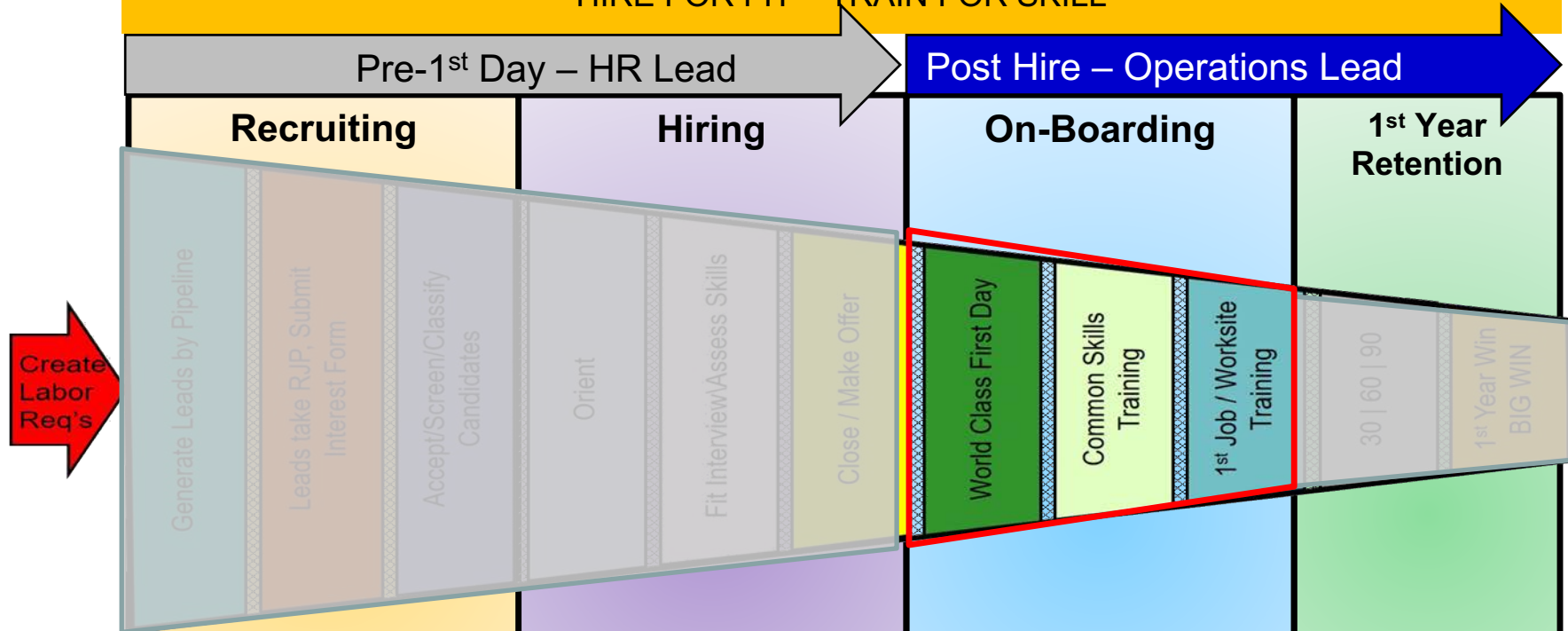
- **World Class First Day**
- **Common Skills Training**
- **1st Job/Worksite Training**





Best Practice Model

Perfect Process: 1 Recruit = 1 Life Long Engaged and Productive Teammate
HIRE FOR FIT – TRAIN FOR SKILL



Pipelines

- | | |
|--|----------------------------|
| 1. Training Providers (CTE Programs, etc.) | 7. Social Media |
| 2. Employee Referral Program | 8. Recruiting Agencies |
| 3. ATDM | 9. Military & Veterans |
| 4. College Departures | 10. Employment Commissions |
| 5. Adult Education | 11. Recovered/Returns |
| 6. Temp Agencies | 12. Retiree's |

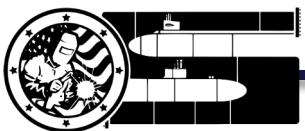
Tools

- | | |
|---|---|
| 1. TA&R Value Stream Mapping and Performance Improvement Plan Development | 7. Common Skills Training |
| 2. Internal Recruiter Training | 8. Leader Training |
| 3. Realistic Job Preview & Candidate Tracking System | 9. 30-60-90 day & 1 Year Fit/Skills Assessment |
| 4. Recruiting & Offer Day/New Hire Orientation | 10. 5th Metric "People" Scorecard Data Driven Program Management System |
| 5. Behavioral Based "Fit" Interviews | |
| 6. World Class First Day | |





What do employers want from new hires?





What do New Hires Want?



- To know what is expected of them from the start
- The materials, equipment, and skills to do their work right
- The opportunity to do what they do best everyday
- To receive recognition or praise
- To feel that their Leader cares about them as a person
- The Encouragement to develop
- To feel they are part of the solution
- To understand and live the vision & mission
- To see and hear that others are engaged and focus on quality
- To feel they have a friend at work
- To be aligned with their leader
- To feel they can learn and grow





Onboarding Process



Executive Summary:

Supplier	Input	Process	Output	Customer

Process Actions	Role				
	HR	Recruiter	Outside Vendor	Dir Leader	New Tmmt Candidate
Task	A	S	R	I	S

Who is **R**esponsible?
 Who is **A**ccountable?
 Who is **S**upporting?
 Who Needs to be Kept Informed?

Supporting Resources: What resources help





Onboarding Process



Executive Summary: Pre-Hire screening consists of the **required** screening tests a New Teammate Candidate must complete prior to their first day on the job. Employment is usually contingent on these screens. These screens must be evaluated to ensure that excess screens are not disqualifying good teammates for bad reasons (Example: Blanket Security Clearance Policies, Outdated Drug Tests)

Supplier	Input	Process	Output	Customer
HR Recruiter Outside Vendors	Screening Instructions Background Checks Drug Tests Physicals	Pre-Hire Screening	Screened Candidates Disqualified Candidates	New Team Candidate Direct Leader HR

Process Actions	Role				
	HR	Recruiter	Outside Vendor	Dir Leader	New Team Candidate
Drug Test / Physical	A	S	R	I	S
Background Check	A	S	R	I	S
New Teammate Candidate Tracking	A	R	S	I	S

Supporting Resources: N/A





Onboarding Process



Executive Summary: Objective of Preboarding is to ensure that the team is aligned and ready to flawlessly execute the World Class First Day. The actions are completed to ensure that the New Teammate is set up for success from day 1 and predisposed to become an engaged and productive teammate.

Supplier	Input	Process	Output	Customer
Senior Leadership HR Mentor Direct Leader Recruiter	Screen Instructions New Teammate Profile WCFD Instructions / Agenda	Pre-boarding	Pre-Briefed Team Informed New Teammate	New Teammate Direct Leader HR

Process Actions	Role				
	Sen Leaders	HR	Mentor	Dir Leader	Recruiter
WCFD Logistics / Rehearsal	A	R	I	S	S
New Teammate Instructions	I	S	S	A	R
Direct Team Pre-Brief	I	S	S	A	R

Supporting Resources: New Teammate Profile, WCFD Instructions and Agenda





Preboarding Resources



New Teammate Profile

- Name
- Age
- Previous Experience
- Position
- Mentor Assignment

World Class First Day Instructions

- When: 9 AM, Tuesday, 1/17/23
- Where to Report: Security Office located at “address”
- Point of Contact:
 - Recruiter
- Attire
- ETC.



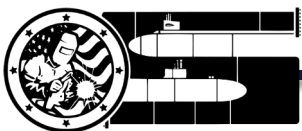


Pre-Hire Screen & Pre-Boarding Steps



Discussion Points...

- **What are the things you are looking to accomplish during this phase of the process?**
- **How long does this generally take?**
- **Are there steps of this phase that are “legacy” steps and perhaps need a fresh review for efficacy?**





Onboarding Process



Executive Summary: Objective of the World Class First Day (WCFD) is to affirm the New Teammate’s decision to join your team. An effective World Class First Day continues to build **New Teammate Engagement** by showing **Senior Leader Engagement**, clearly explain **Roles and Responsibilities**, and creating a **Positive Ownership Handoff** between HR/Recruiters and Operations.

Supplier	Input	Process	Output	Customer
New Teammate Senior Leaders Direct Leader HR	WCFD Agenda and Resources	World Class First Day	New Teammate Predisposed to become Engaged	Direct Leader Direct Team

Process Actions:	Role			
	New Teammate	Senior Leader	Direct Leader	HR
WCFD Event Execution	S	A/S	S	R
WCFD After Action Review	I	S	S	A/R

Tools / Supporting Resources: World Class First Day Agenda, Script, Presentations and Materials, Expectations, L2 Power 9, Engagement Behaviors



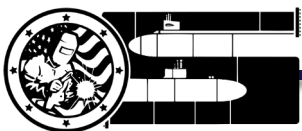


Purpose of World Class First Day



- A new hire's first day on the job is often accompanied by nerves and anxiety.
- Creating an effective new hire first-day experience can benefit employees and the company by making new hires feel comfortable.
- A great first day on the job sets the tone and prepares new hires for their role at the company.
- Inform new hire and bring them in as engaged employee
- Introductions and involvement of Senior Leadership to build relationship and trust in the organization
- Prepare new hire to be productive successful employees

What does your new employee's first day look like?





What do we want the new hire to understand within their first 24 hours with the company?

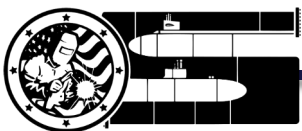




We want them to know...



- **Leader's expectations**
- **What engagement is**
- **The value stream (what we do and how we make money)**
- **Their Team**
- **Who their navigator is**
- **How they fit on the team**
- **How they can be successful in their first job**





World Class First Day Example



Objectives

- **Agenda for the Day (what will new hire be receiving that day, i.e. Badge, PPE)**
- **Paperwork Review**
- **Brief Company History**
- **Expectations/ Core Values**
- **“Welcome” from executive leadership and direct leader**
- **HR Company Policies and Procedures, Benefits Overview**
- **Common Skills: What every new hire should know to be successful for the first day on the job**
- **Safety: PPE Required, all safety protocol**
- **Quality Brief**
- **Path Forward**
- **Direct Leader Expectations, Work Area Orientation and On the Job Training**

Example Agenda

Time	Activity
9:00	New Hire Arrival
9:00-9:15	Badge Pictures
9:15-9:25	Director Welcome / Expectations
9:25-9:30	Manager Welcome / Expectations
9:30-9:35	Supervisor Welcome / Expectations
9:35-10:05	HR Welcome/ Agenda Review Turn in New Hire Packet
10:05-10:15	BREAK
10:15-11:30	Common Skills Training (Business 101)
11:30-12:00	Safety Brief
12:00-12:30	Lunch with the Leadership
12:30-1:00	Quality and Regulatory
1:00-1:15	World Class First Day Wrap Up/ Path Forward Expectations
1:15-1:30	BREAK
1:30-2:30	Leader Expectations, New Hire Intros to Team and Job Site Orientation





Onboarding Process



Executive Summary: The Objective of Common Skills Training is to provide New Teammates with the Knowledge, Skills and Abilities of all common tasks a teammate needs to know in order to be successful on the first day. Common Skills Training can be integrated into the WCFD, completed within first week, or a combination of both.

Supplier	Input	Process	Output	Customer
Instructors Direct Leaders HR / Training Mentor	Instruction Supporting Documents New Teammate	Common Skills Training	Trained New Teammate	Direct Leader Direct Team

Action/Process	Role			
	Instructors	Direct Leader	Mentor	HR/Training
Scheduling, Logistics and Tracking	S	S	I	A / R
Instruction and Assessments	R	I	I	A / S
Practical Applications	I	A	R	S

Tools / Supporting Resources: Common Skills Training, Instructional Specific Supporting Documents





Common Skills Training Example



– Phase 1: Completed on WCFD

- **Safety:** Stop Buttons, Safety Bars, Light Curtains, Lock-Out/ Tag-Out Procedures, Rotating Equipment Vs. Use of Gloves, Special Fixtures, Safety Glasses & Other PPE, Fluid Leaks, Electrical Cords, Machine Malfunctions, Walkways, Accidents
- **First Line Quality Control:** What do you want the New Employee to be looking for on the first day? 8 Forms of Waste, Root Cause Analysis
- **Product Cleaning:** Basic description and instruction of cleaning tools and how to use them.
- **Packaging and Documentation:** Where the packaging requirements can be found, importance of correct labeling, and brief descriptions of the different forms used.

– Phase 2: Completed on Day 2

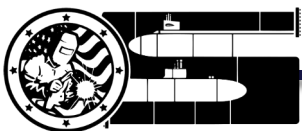
- **Basic Instruction for Scales:** How to Check and Zero Scales, Read Triple Beam Scales, and Zero/Tare and Set Up Counting Scales.

– Phase 3: Completed within 1st Week

- **Mold Maintenance:** Proper cleaning of molds during production and shutdown, using brass only on molds, waxing, blowing out mold and vents, and watching for problems with the mold such as high or damaged ejector pins.

– Phase 4: Completed within 1st 10 Days

- **Functions of Press Operator:** Opening and Closing the Press Door, Loading Raw Materials, Loading Inserts, Using a Shot/Part Counter, Removing Parts from Mold, Properly Closing the Mold, Contacting Personnel for Assistance





Summary



- **Onboarding is not a single-day event**
- **It takes deliberate planning and preparation by the organization**
- **The desired outcome is to assure the new teammate transitions into the organization smoothly and efficiently**
- **Keep them ENGAGED throughout the process**

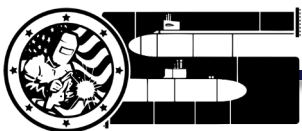




ELO: Identify Training Provider Student Prep for 1st Job Process Steps



- **Preparing Students for Interviews**
- **Interview Etiquette**
- **Potential Interview Questions**
- **Questions to Ask Employer**
- **Candidate Feedback After Interview**



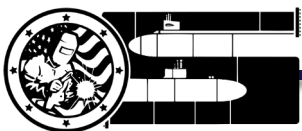


Assisting Students for Interviewing



Mock Interviews

- Utilize a different teacher or students in class to interview each other
- Provide student feedback that can be improved upon
- Highlight what student did well and one thing that they could work on
- Keep in mind- First Impressions make lasting Impressions
- Provide classroom time for practice-
 - Ex. Juniors can interview Seniors,





Mock Interviews and Preparation



Importance- Treat it like a real interview; practical impact on students

- **First Impressions COUNT!**
- **Increases student confidence**
- **Highlights what to expect/anticipate during interview**
- **Reduces Stress and anxiety**
- **Ensures student is familiar with process**

Remind Students-

- **Firm Handshake, Make Eye contact, Communicate effectively**





Interview Etiquette



Be on time

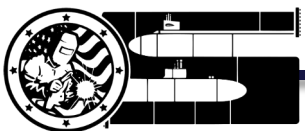
- Arrive 10-15 minutes earlier for your Interview,
- Check-In with front desk

Be presentable

- Clothes neat and clean, Business casual
- PPE and Safety Equipment
 - (Ex. Weld Test, Shirt and Tie vs. Having PPE on hand to perform)

Be prepared

- Resume, Cover letter, References, PPE as needed
- Any additional documents they may have requested

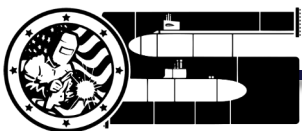




Potential Interview Questions



- Tell me about yourself?
- Tell me about a time where you had to overcome conflict ?
- What do you know about our company?
- What position are you looking to hold?
- Name a strength and weakness?
- Why should we hire you for our company?
- What skills do you possess that will help you in the position?
- Have you worked before?- Tell me about your work history?
- Do you have reliable transportation?
- Tell me about a challenge or conflict you've faced at work, and how you dealt with it.
- Where do you see yourself in five years?
- What's your dream job?

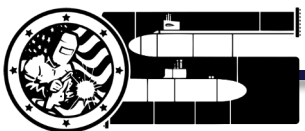




Questions for the Employer



- **Can you tell me more about the day-to-day responsibilities of the position?**
- **What do you enjoy about working at company?**
- **What are the next steps in the interview process?**
- **What is the company culture like?**
- **What professional development opportunities are available?**
- **How many shifts are available to work? Opportunity for Overtime?**

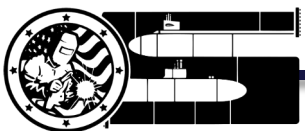




Candidate Feedback after Interview

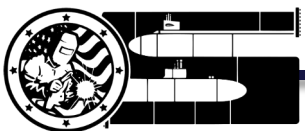


- **Thank Employer**
- **Ask for Business Card or an email so that you can follow up with Employer**
- **Send a Personalized Thank you note via email**
 - **Thank Employer for time and consideration**
 - **Send within 48 hours of interview**





What feedback would you want to provide to Training Providers about Preparing Students for the Interview Process?

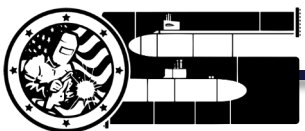




ELO: Understand Training Provider Student First Job Preparation



- **Preparing Students for First Day on the Job**
- **Employer Feedback**

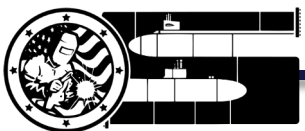




Preparing Students for First Day on the Job

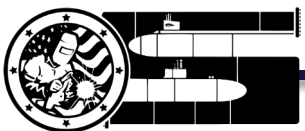


- **What to Wear? What do you need to bring?**
 - **Uniform, PPE and Safety equipment, Lunch, Schedule, Paperwork**
- **Researching the company online**
 - **Know a few things about the Company- Motto, Product, Recent News event**
 - **Student should know why they desire to work at company**
 - **What does the student already know about the company?**
 - **Demonstrate interest and enthusiasm about the company**
- **Remind student to practice the commute and know where they are going prior to interview**
 - **Public Transportation OR Drop off at work**





What feedback would you want to provide to Training Providers about Preparing Students for the first day on the job?





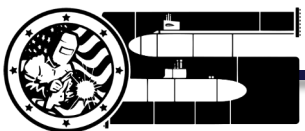
LUNCH





Philadelphia Works Inc.

**Ron Story,
Business Engagement Representative**





PHILADELPHIA WORKS
WORKFORCE INVESTMENT
OJT – IWT & CUSTOMIZED TRAINING GRANTS
TALENT PIPELINE PROGRAM

*Ronald Story, Project Manager,
Logistics & Transportation Industry Partnership*

- Introduction
- Background
- OJT Initiation and Procedures
- Wrap-up and next steps

Training Assistance Programs

- On-The-Job Training (OJT)
- Customized Job Training (CJT)
- Incumbent Worker Training (IWT)
- Pre-Apprenticeship and Apprenticeship Programs
- Layoff Aversion



Qualifications for Training Programs

Employers must meet the following qualifications:

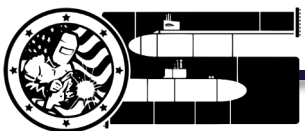
- Federal Employer Identification Number (FEIN)
- Job Description
- Training Plan
- Workman's Compensation Certificate of Insurance
- Located in Philadelphia region
- Full-time position (30 hours per week)
- A minimum wage of \$15.00 per hour



Employer Referral Checklist

Today's Date:

1. Company Name:
2. Address:
3. Phone Number:
4. Company Representative:
5. Company Representative Email:
6. Company Representative Phone Number:
7. Source of Referral:
8. FEIN:
9. Job Title:
10. Job Description submitted? Yes No
11. Are healthcare benefits offered for this position? Yes No
12. Hourly Wage:
13. Scheduled Hours per Week:
14. Frequency of Pay (weekly, bi-weekly, etc.):
15. If an employee is successful in this position, please list the possible career ladder:





(SAMPLE) Skills Development Plan Example

Please be as detailed as possible when completing the plan outlined below.

Employee name: John Doe
Employee Phone #: (xxx) xxx-xxxx

Participant ID: 111111111

Job-specific information (all fields are required, unless otherwise indicated)

Job title	Estimated start date	Hourly rate of pay	Frequency of pay	Date of first pay	Hours per week	Shift (if applicable)
Landscape Associate	09/24/20	\$15.00	Bi-weekly	10/08/20	40	N/A

Job requirements

Required credential/training	Description of relevance and how to obtain
OSHA 30-hour general industry	Ensures safety in the workplace. There will be study and training time provided to the job seeker during the OJT.

Opportunities for advancement

Position title (for advancement)	Description of position	How to advance to position
Landscape technician	Can lead work on-site without additional supervision	Show mastery of associate-level skills, ability to lead others, and initiative to learn. Must obtain technician certification.





Information Needed for OJT Contract

Today's Date:

XX/XX/2021

Company Information

Company Name:

FEIN Number:

Company Representative:

Company Phone number:

Trainee Information Trainee

Name:

Trainee Phone Number:

Trainee Email Address:

3-9 information only needs to be provided one time unless information changes

1. *Job Description on Company Letterhead:
2. W-9 Paperwork (One form for the company)
3. Offer letter to Trainee
4. *Job Task Analysis Template (JTA) (Example Below):
5. Insurance Carrier:
6. Workman's Comp Policy #:
7. *Certificate of W/C Insurance: **Philadelphia Works should be named as Certificate Holder.**
The certificate should read as follows:

Philadelphia Works, Inc.
One Penn Center at Suburban Station
1617 JFK Boulevard, 13th Floor
Philadelphia, PA 19103

8. Is your company represented by a Union for this position? No
9. Does this position offer medical benefits? No
10. Please list all holidays that your company observes:
11. Individual who can sign contract and title:
12. Individual responsible for training:
 - a. Name:
 - b. Title:
 - c. Email:



- **On-the-Job Training (OJT) Initiation Process**

Presentation Objectives

- By the end of this training, Pipeline Employers will...
 1. Understand step-by-step procedures, including who, what, and when for each step of the OJT process
 2. Understand when and how to use the application documents and support staff for each step
 3. Become familiar with Training Grants and the steps you should take to initiate them.

- **Background**

OJT Contracts

- Analyzed the OJT Contract Application Initiation process
 - **Purpose:** to better understand the benefits of an OJT, the OJT process, identify how you can use them in your business, and how to apply (application).
- Identify the steps involved and how to receive assistance with talent development
- OJTs are used as intended – not just to subsidize a job vacancy

OJT WORKFLOW

- OJT Workflow and Procedures

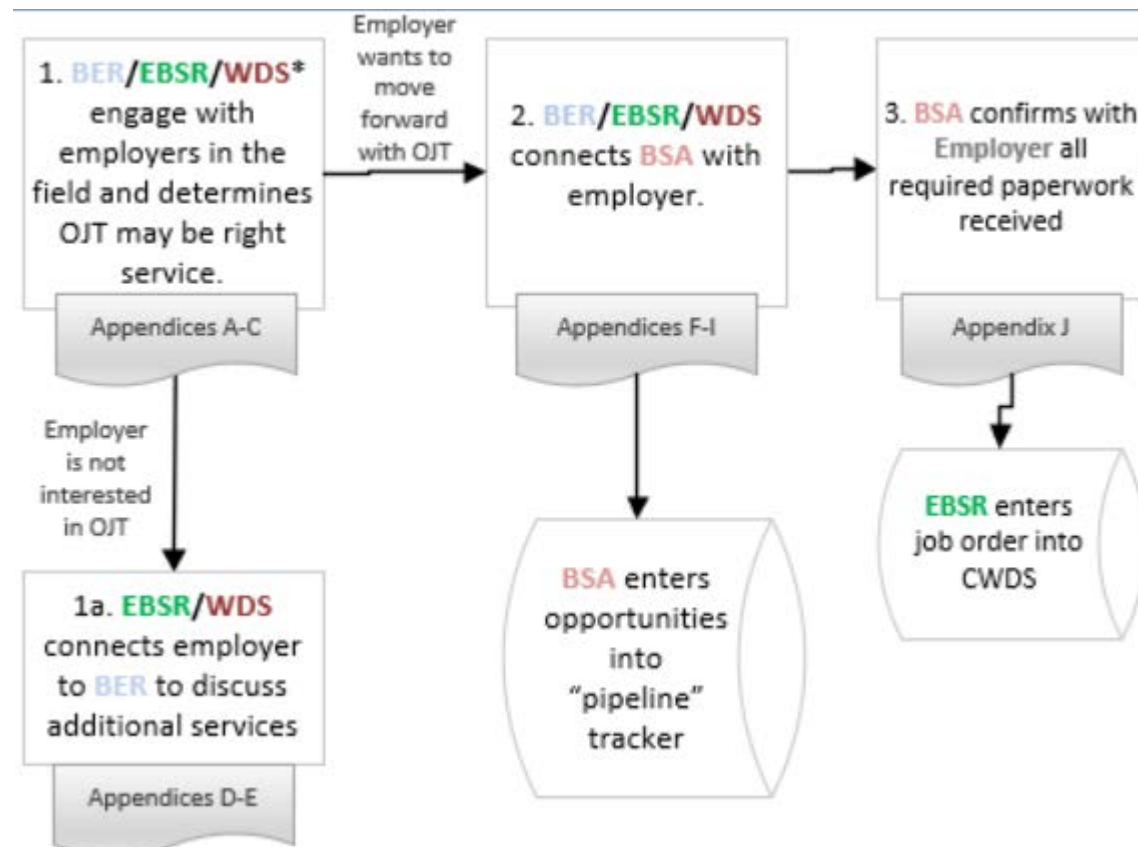
The workflow illustrates distinct steps of the OJT initiation process based on three high-level activities

1. Initial Inquiry and Information Gathering
2. Candidate Fulfillment
3. Contract Initiation

Steps 1-3: Initial Inquiry

Step 1: Employer Engagement

- Who: **BER/EBSR/WDS**
- What: Engage with employers to determine relevant services
 - If OJT is deemed right, move to Step 2
 - If OJT is not right, then the **EBSR/WDS** should connect the employer to the **BER**
- When: Continuous communication with employers about potential opportunities



Step 1: APPLICATION DOCUMENTS

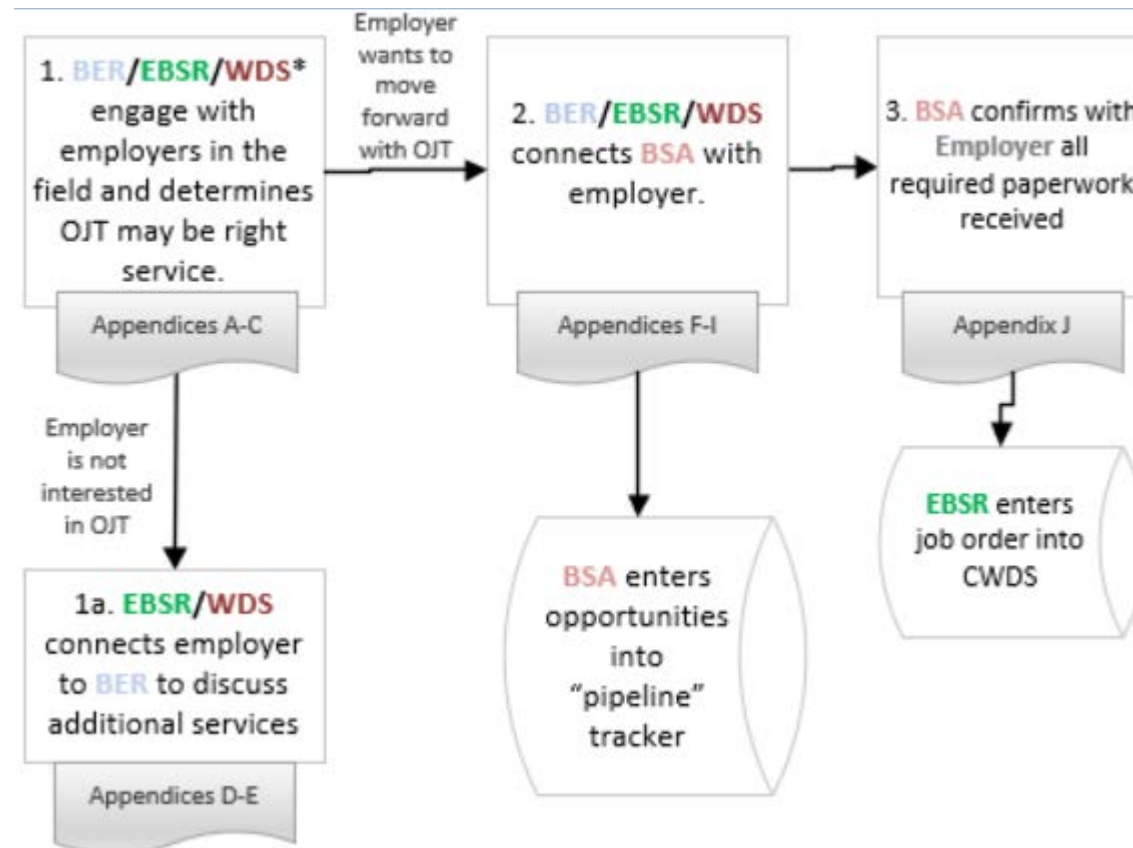
Document	Title
A	Application –OJT/IWT/CJT
B	W9
C	Certificate of Insurance [Includes Workman’s Comp]
D	Skills Development Plan or Training Plan
E	Job Description

Step 1: APPLICATION DOCUMENTS

Document	Title
F	Candidate of interest; Name, e-mail and the last four digits of the SSN is required [no form required]
G	WIOA Registration Required
H	Company Data Collection Form
I	Participant Data Collection Form

Step 2: Connect the Employer with the BSA

- **Who:**
BER/EBSR/WDS
- **What:** Connect the employer to the BSA and provide the employer with relevant documentation to complete
- **When:** After an employer expresses interest in and is a good fit for an OJT

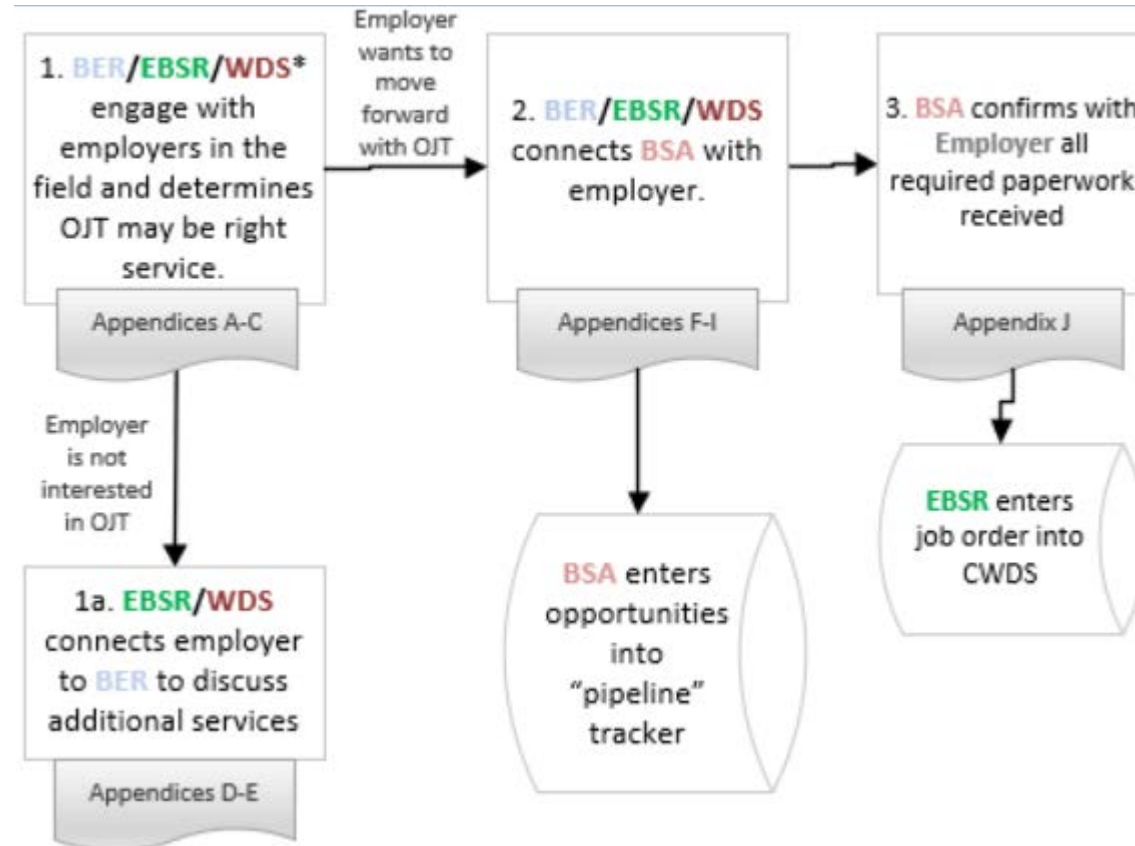


Step 2: Supporting documents

Appendix	Title	Purpose
	Email Template Introducing the BSA	Establishes a connection to BSA and makes the initial request for the employer to complete the required paperwork which is attached to the email
	WIOA and TANF OJT Policies	Provides employer with all relevant information about OJTs
	OJT Application	To collect basic employer information to ensure eligibility and readiness to engage in OJT offering
	Skill Development Plan	To illustrate the level of specificity needed from the employer about the planned training

Step 3: Confirm Employer has received Paperwork

- / **Who:** BSA
- / **What:** Employer submits all paperwork and BSA confirms receipt
 - BSA coordinates with EBSR to enter job order
- / **When:** After mutual agreement with the employer that the OJT offering will meet its current needs



Step 3: Supporting Documents

Appendix	Title	Purpose
J	Information Checklist	BSA uses this checklist to confirm that all required paperwork is received and that it is completed fully

Step 4: Knowledge check

1. We should offer the OJT as a service to the employer before discussing all the available services. True or false?
2. There is an employer fee for participating in Workforce Training Grant program. True or False?
3. What materials should be completed by the employer to initiate Training?

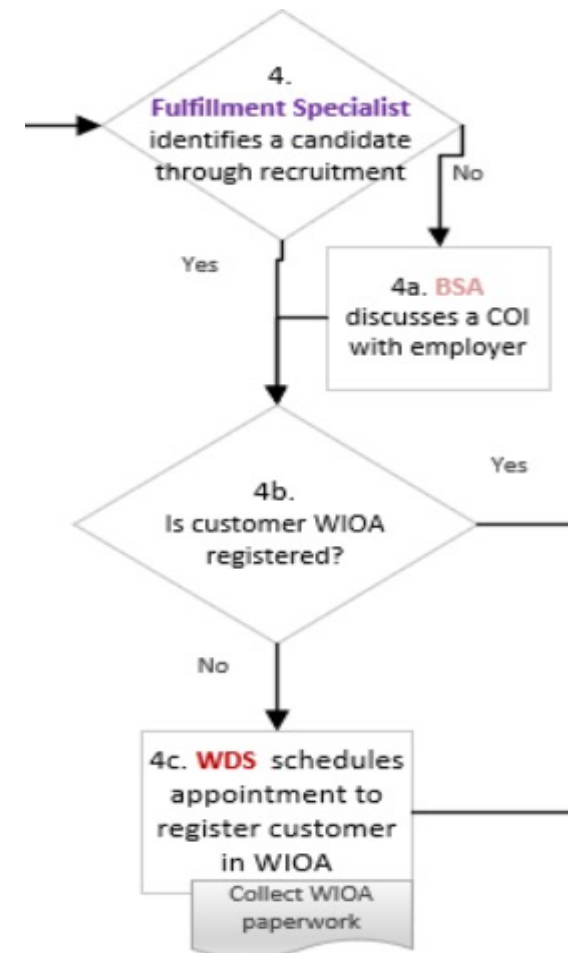
• Questions on Steps 1-3?

Step 4: Candidate fulfillment



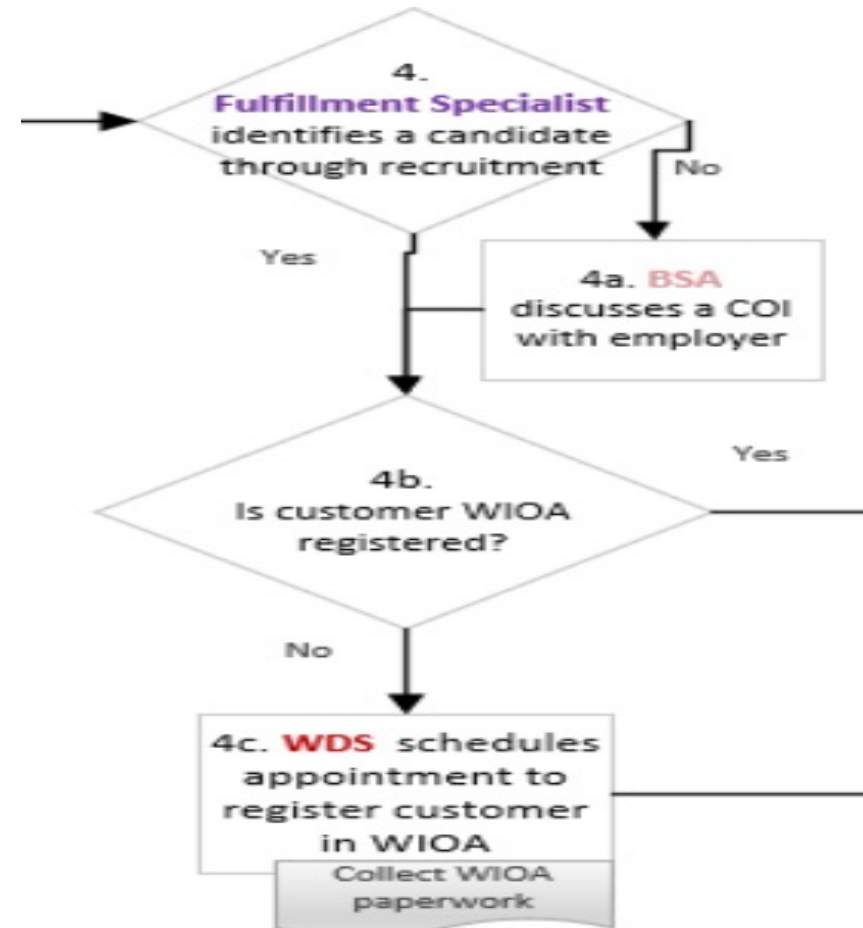
Step 4: Identify Candidate for OJT Opportunity

- / **Who:** Fulfillment Specialist
- / **What:** Fulfillment Specialist works to identify a candidate to fill the OJT opportunity
- / **When:** After the job order has been entered into CWDS



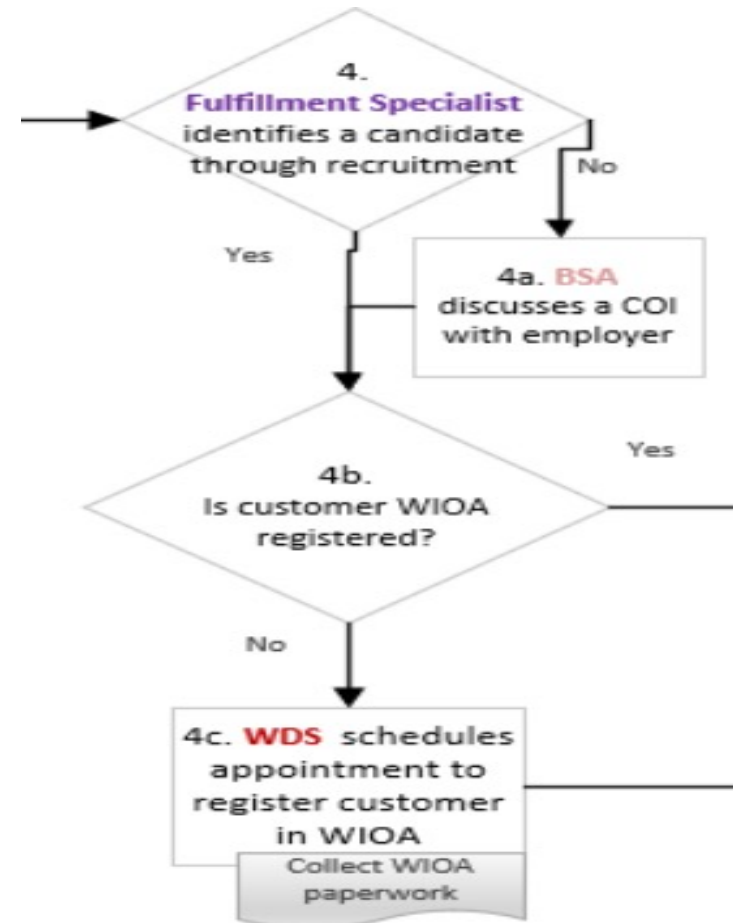
Step 4a: Finding a Candidate of Interest

- / **Who:** **BSA**
- / **What:** Coordinate with employer to identify a candidate of interest, if needed
- / **When:** Only after the **Fulfillment Specialist** has been unable to find a candidate from within the workforce system



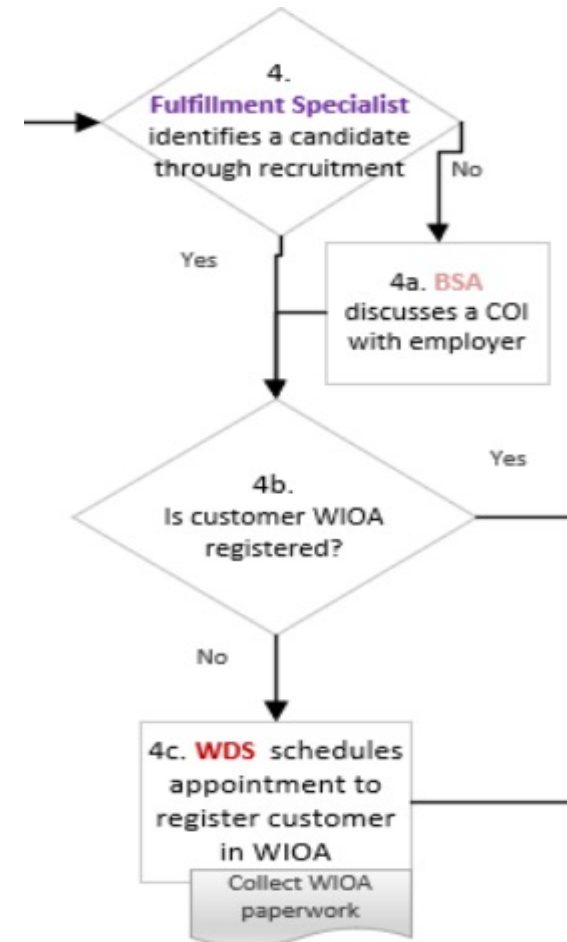
Step 4b: Confirm WIOA Registration

- / **Who:** BSA
- / **What:** confirm whether a candidate is WIOA registered
- / **When:** After a candidate has been identified to move forward with



Step 4c: Complete WIOA Registration

- / **Who:** **WDS**
- / **What:** Collect WIOA paperwork and assist the candidate in registering for WIOA by scheduling them a registration appointment
- / **When:** After a candidate has been identified and is determined not to be WIOA registered

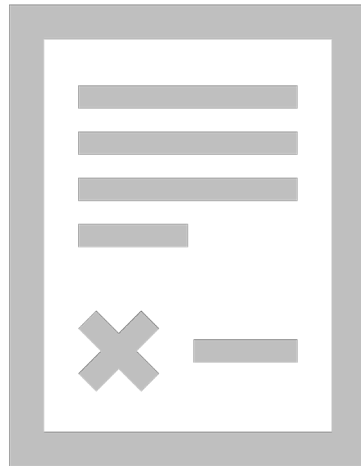


Step 4: Knowledge Check

1. My company works closely with my CareerLink Office. True or false?
2. A candidate must be WIOA registered. True or false?
3. The Fulfillment Specialist is responsible for coordinating WIOA registration. True or false?

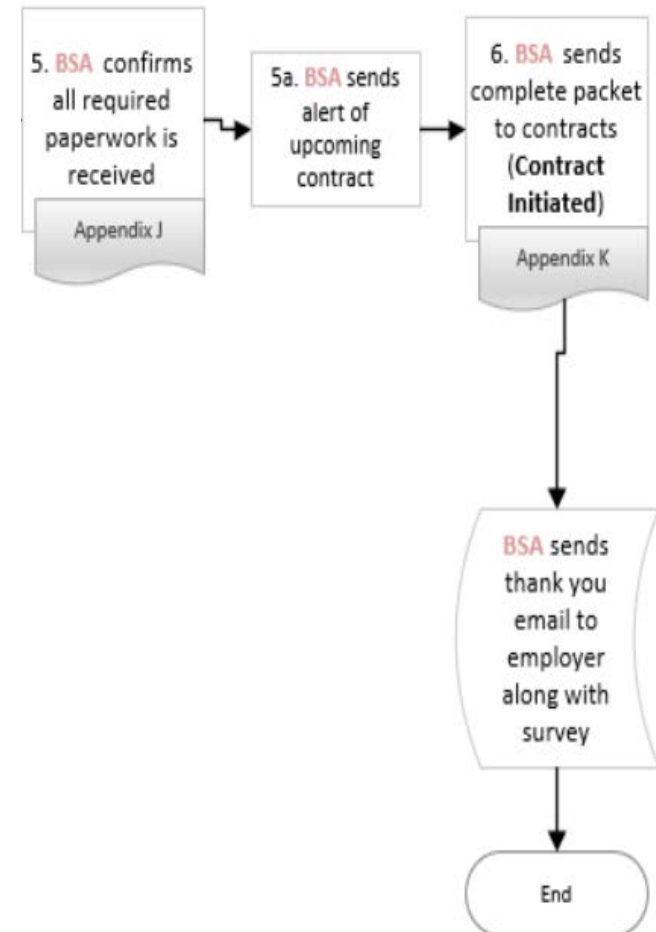
• Questions on Step 4?

Step 5-6: Contract Initiation



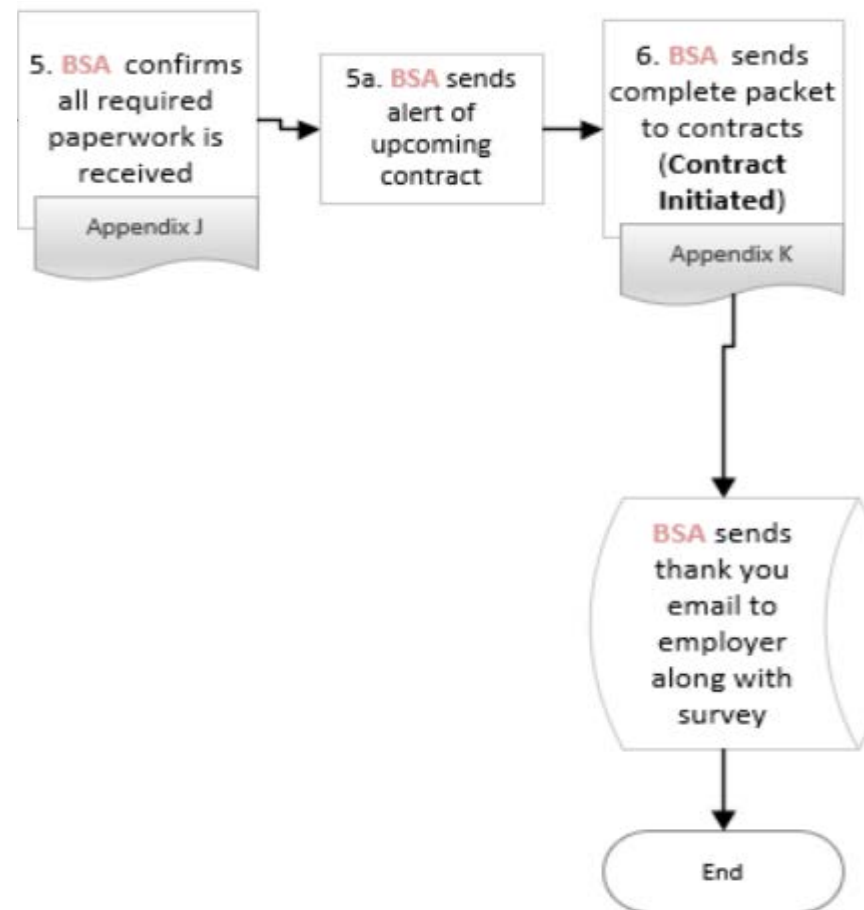
Step 5: Confirm all Paperwork

- Who: **BSA**
- What: Confirms all necessary paperwork is received from the employer
- When: After the candidate has been confirmed to be WIOA registered, and employer has submitted required documentation



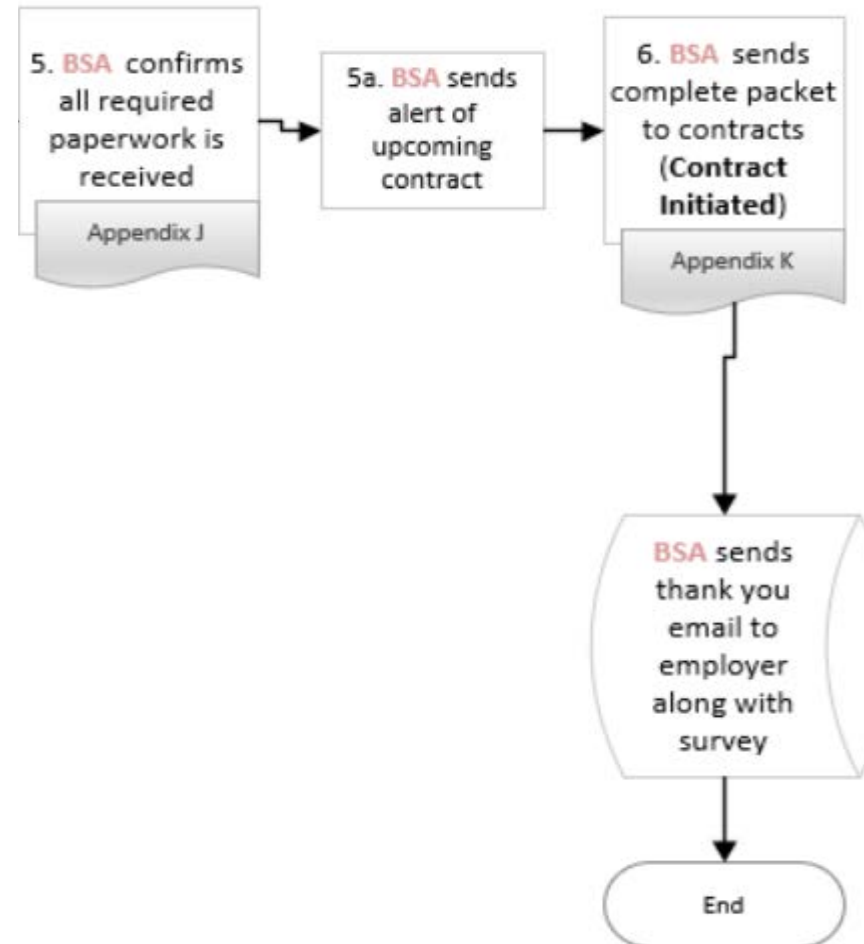
Steps 5a: Notify Contracts

- Who: **BSA**
- What: Notifies Contracts of the upcoming contract
- When: After all required paperwork is confirmed



Steps 6: Contract Initiation

- Who: **BSA**
- What: Sends complete OJT packet to contracts
- When: As soon as the packet is ready to send



What's Next

- Start by completing an OJT Application and finalize YOUR Master Agreement.
- Review the related tools and templates AND attend additional sessions related to their use
- Submit any questions to Bo, Kamisha, and Bruce on an ongoing basis
- Keep an eye out for emails about Workforce Training Grant funding and activities throughout the Pipeline Program.

Philadelphia Works Funds

Supported by:

- Federal
- State
- City
- Privately-raised Employment & Training funds



Philadelphia Works Business Engagement Team

We offer ***employer cost-reimbursement training solutions*** that are aligned with industry needs.



On-The-Job (OJT) Training

- Assists employers with the cost of hiring and training new employees
 - Employers can train new employees at their place of business and receive a cost-reimbursement of gross wages during training.

OJT Qualifications

- Federal Employer Identification Number (FEIN)
- Job Description
- Training Plan
- Workman's Compensation Certificate of Insurance

Customized Job Training (CJT)

- Classroom-based training services that assist eligible employers to train employees in specific job-related skills to obtain and maintain employment
- Philadelphia Works, Inc., provides cost-reimbursement toward the cost of training.
 - Employers cost may be in-kind and Philadelphia Works will provide grants up to 50% cost-reimbursement of the eligible costs for training new employees.
- Employer will be engaged in both the pre-screening and the curriculum development processes

Incumbent Worker Training (IWT)

IWT is intended for workers with the following:

- Established work history with their current employer
- Possess the knowledge, skills, and abilities needed to complete their present job responsibilities
 - To remain in their position, to advance in the company, or to avoid a layoff, the employees now need additional training.

To qualify as an incumbent worker, the individual must:

- Have an established employment history with the employer for **6** months or more

Pre-Apprenticeship Programs

- **Pre-apprenticeships** are designed to prepare workers for the minimum requirements for entry into an established **apprenticeship program**.
- **Pre-apprenticeships** can be designed for specific populations:
 - High school students
 - Opportunity youth (who are out of school and out of work),
 - Women In Nontraditional Careers (WINC)
 - Minorities
 - Veterans
 - Mature Career Seekers
 - Returning Citizens

Apprenticeship Programs

Apprenticeship =

A combination of on-the-job training (OJT) and related classroom instruction under the supervision of a journey-level craft person or trade professional in which workers learn the practical and theoretical aspects of a highly skilled occupation.

Philadelphia Works provides the technical support to assist employers with establishing an Apprenticeship program.

- Established Apprenticeship programs can receive cost-reimbursement to assist in training employees



Q&A

Connect!



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<https://twitter.com/Philaworks>



<https://www.linkedin.com/company/philadelphia-works/>



<https://www.youtube.com/watch?v=6z0G7dpXTMY>

Administrative Offices

Phone: 215-963-2100

Fax: 215-567-7171

Website: www.philaworks.org

Email: info@philaworks.org

Thank you!

thank you

Philadelphia Works is headquartered in Philadelphia's historic One Penn Center at Suburban Station, 1617 JFK Boulevard, 13th floor, Philadelphia, PA 19103. The office is wheelchair accessible and reachable by all major thoroughfares and public forms of transportation.



Widener Small Business Development Center

**Kevin Tacchino,
Assistant Director**





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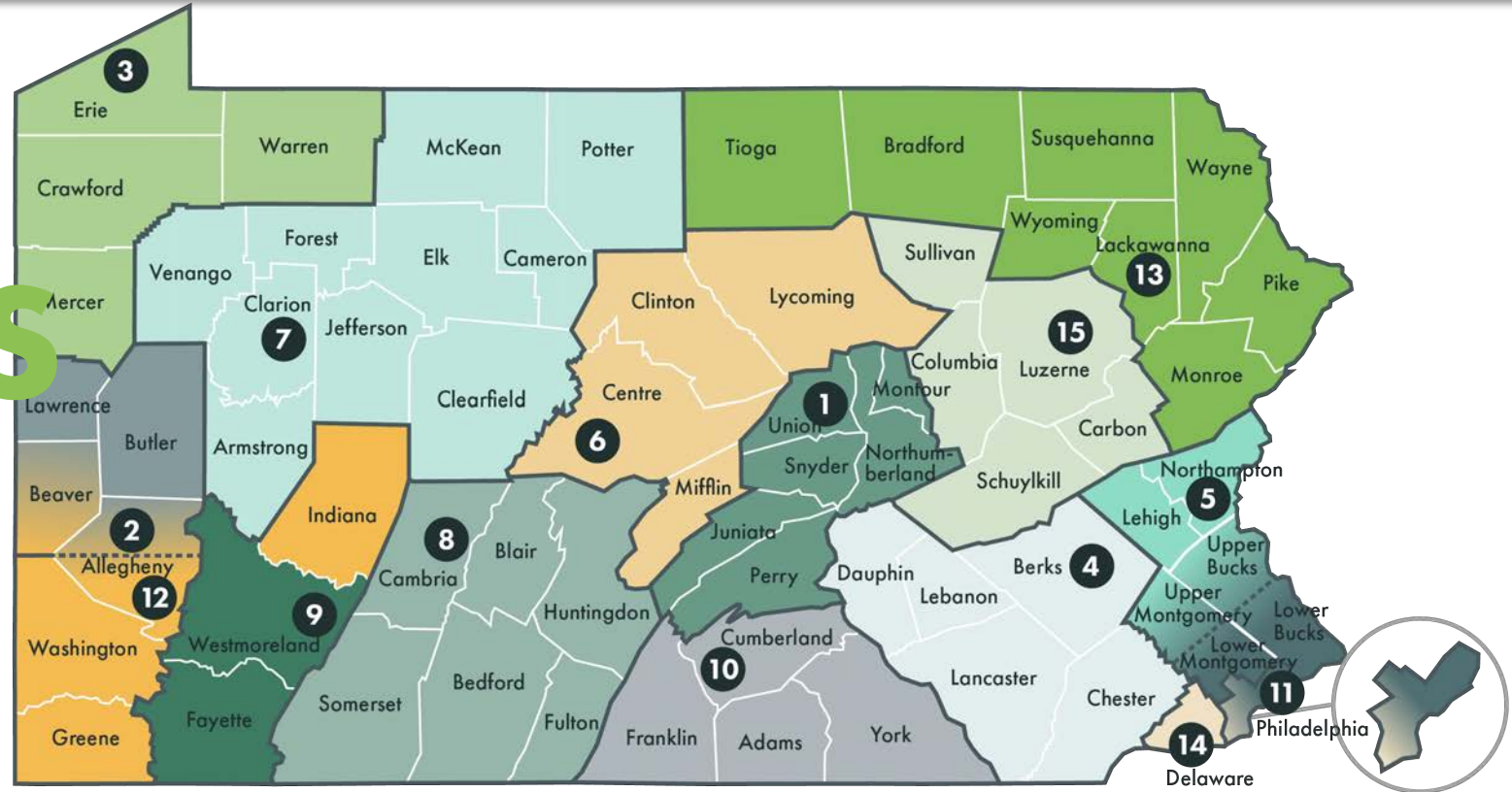
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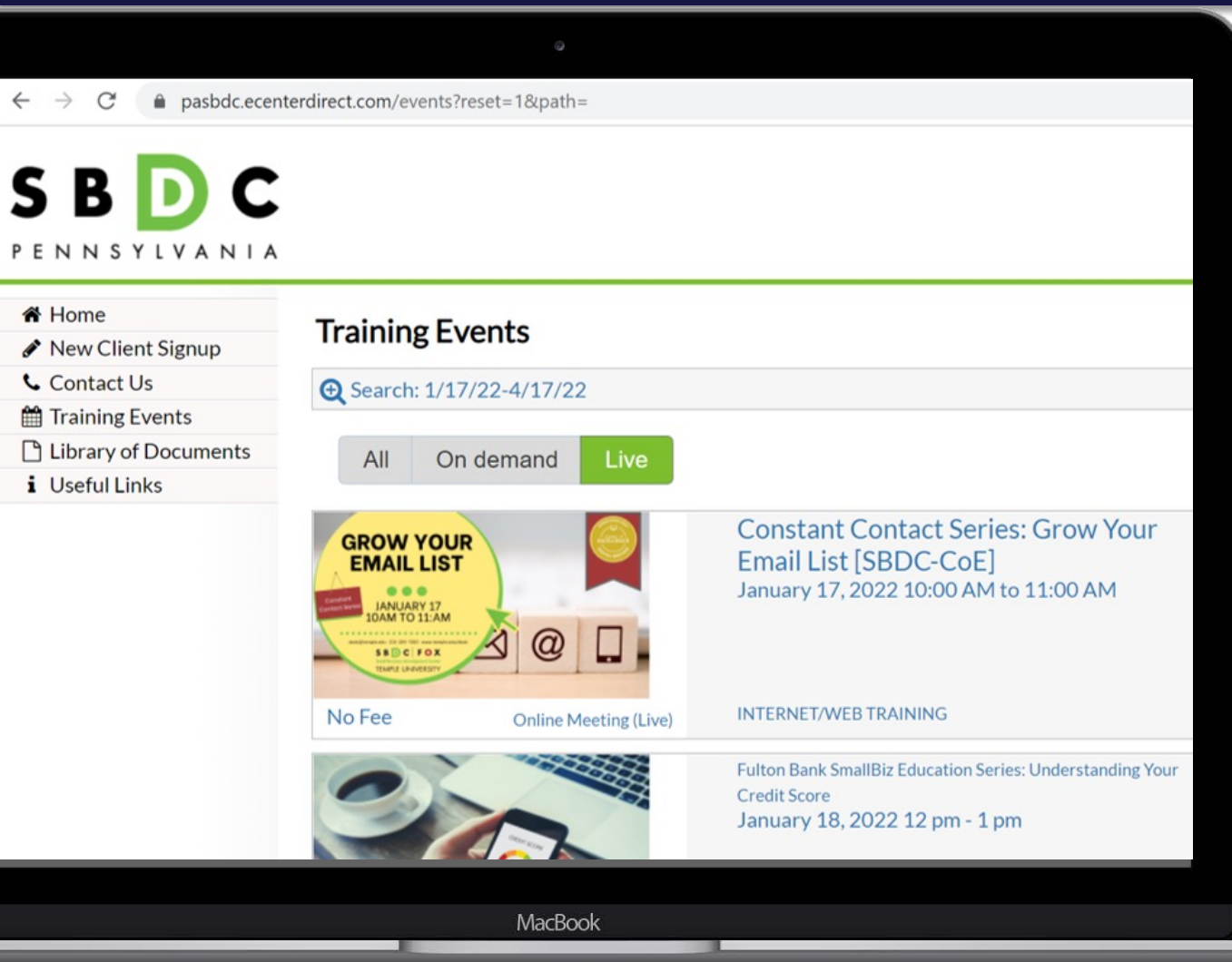
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- 4 SOCIAL MEDIA
- .



METRICS FOR NETWORK

Our 2022 Impact for Small Businesses in PA



SERVICE

CREATIVE

BRA



**Government
Procurement**



**Environmental
Compliance**



**International
Business**



Capital Access

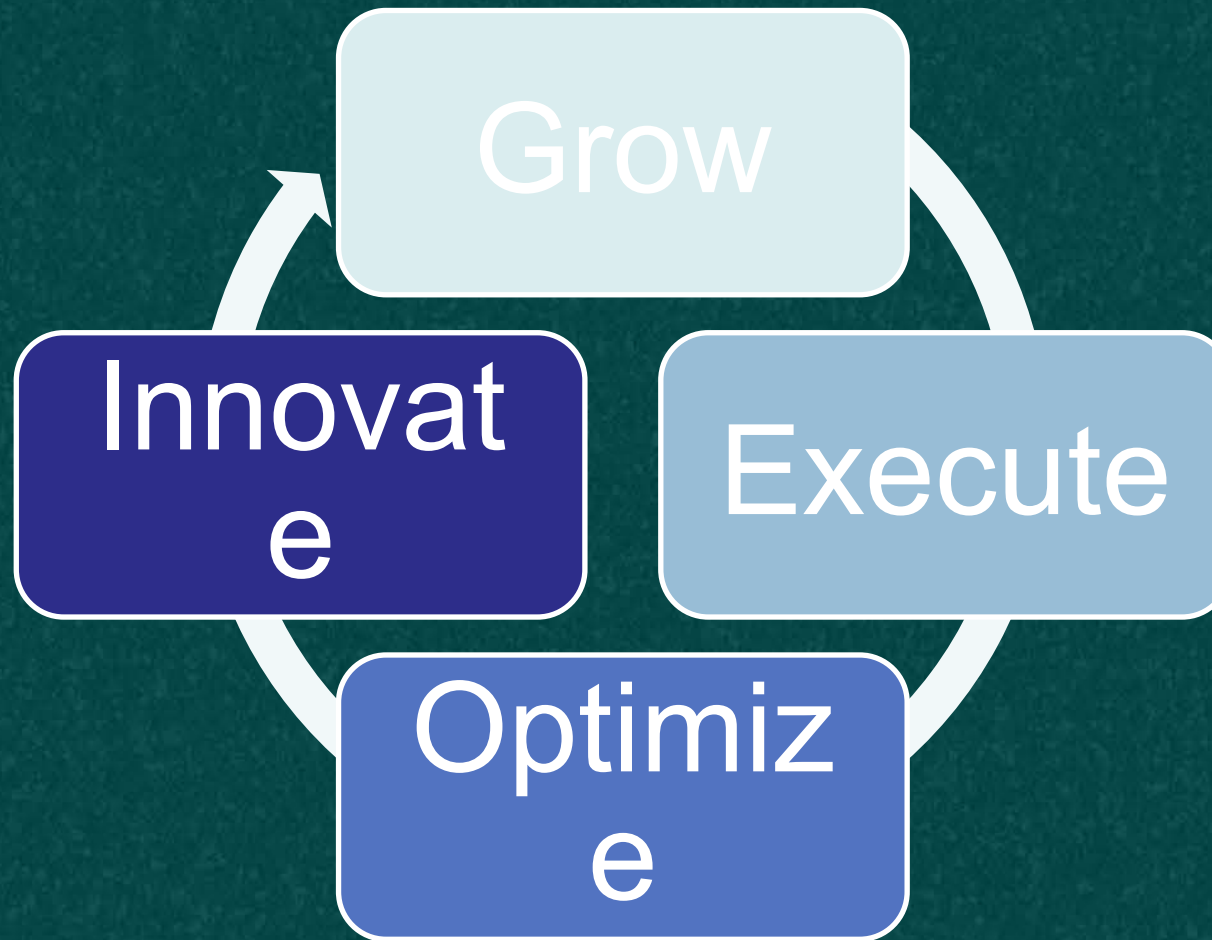


**Strategic
Planning**



**Networking
Relationships**

Company Lifecycle





How We Help You Grow



Capital Formation Sprints

Sell through International Channels

Develop your Government Contracts



How We Help You Execute



Custom Contact Lists for Relationships

Networking Relationships

Compliance



How We Help You Optimize



Government Connections

Expert Advise

Market Research



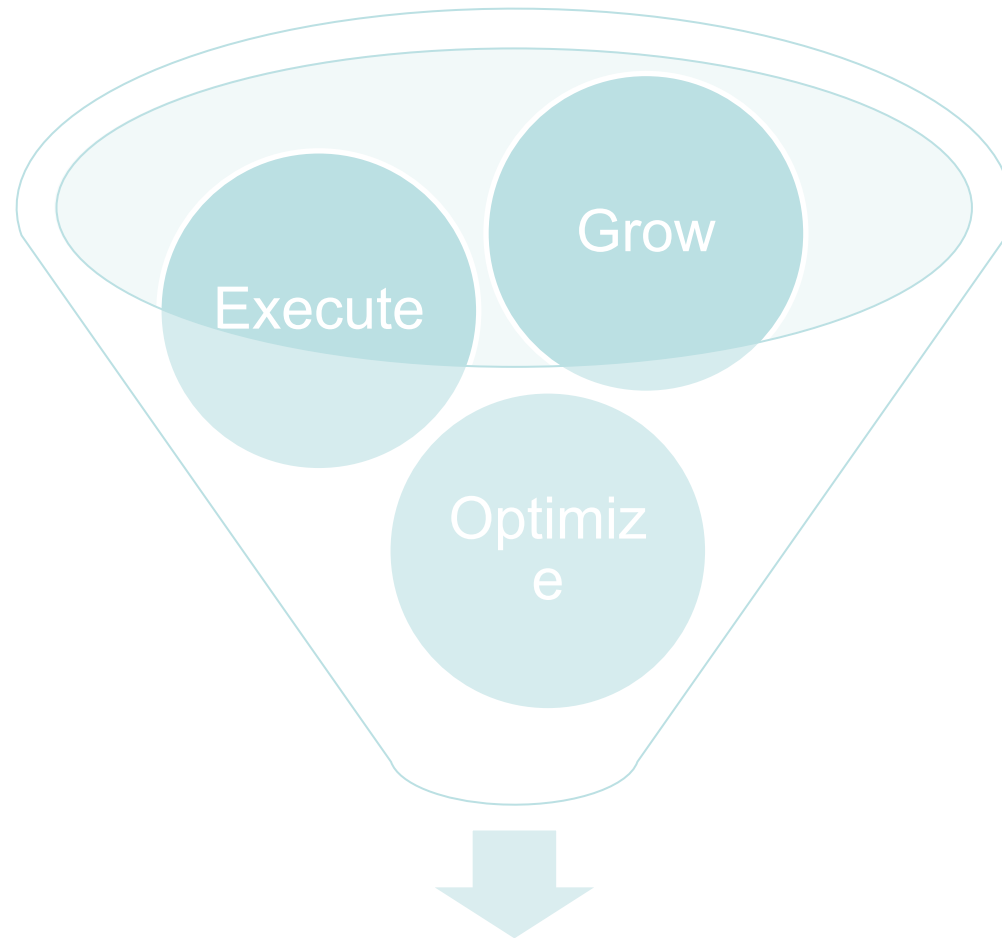
How We Help You Innovate



Business Strategy

Expert Advise

Market Research



Culture of Innovation =
Attraction and Retention

Thank You

[Schedule a Phone Call](#)

[Schedule a Zoom Meeting](#)

[Schedule an In Person Meeting](#)

Request Consulting:

<https://pasbdc.ecenterdirect.com/signup>

Kevin Tacchino

Assistant Director

Widener Small Business

Development Center

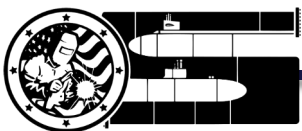




ELO: Clarifying Expectations and Building Trust

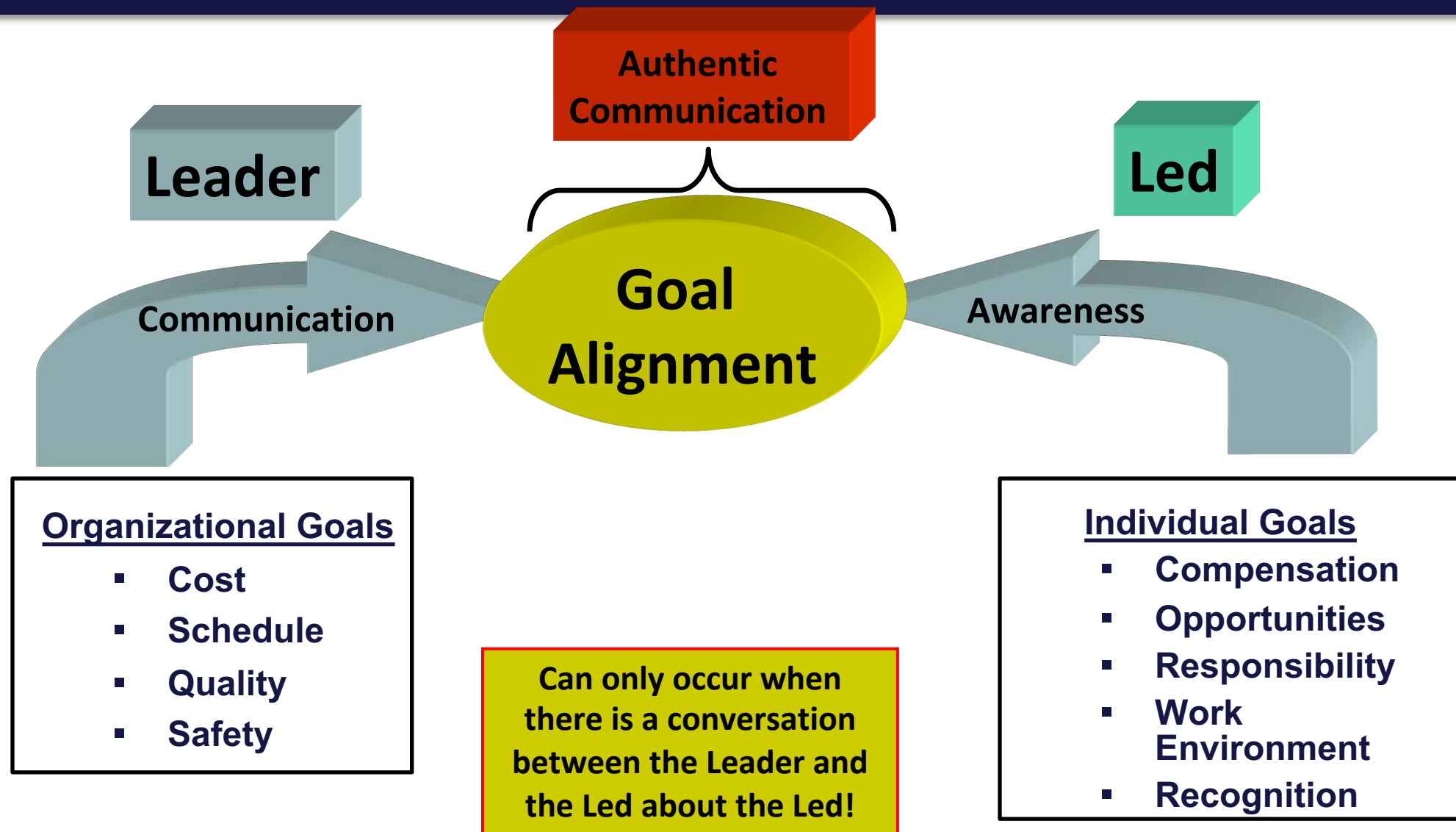


- **Leader to Led Linkage**
- **Importance of Trust**
- **Application of Tools to Improve Engagement and Build Trust**
- **Impact of Engagement on Productivity**





Leader to Led Linkage





Vertical Dyad Linkage

The Linkage Power Depends On...

1. Leaders Managing Personal Relationships

- Vertical Dyad: Leader \longleftrightarrow Led x number of direct reports
- Employee performance, productivity, and engagement depend on their relationship with their IMMEDIATE Supervisor

2. Leader and Led continuously Creating Shared Mutually Supportive Goals

- The Employee's Goals and Needs
- The Organization's Goals and Needs as articulated by the Leader
- Requires continuous Goal Alignment within Developmental Plans and continuous Feedback

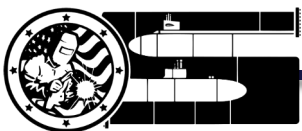




L2 Power9 Guide



- 1. I am your Leader clarity**
- 2. I Trust You**
- 3. You understand what we do and how we make money**
- 4. You know what to do at work everyday**
- 5. You have the materials, tools, and equipment to do your work correctly**
- 6. You know how to do the work correctly the first time**
- 7. You know your role, the roles of your teammates and how you work together as a team**
- 8. My team and I know the score and we play to win everyday**
- 9. My leader cares about me as a person and wants to help me be successful**





Clarifying Expectations





10-Year-Old Expectations



Rules for the ²⁰¹⁴ Summer

- we are going to have fun, but we have changes, but good changes!

- the first change is we are going to have a schedule (raise your hand if you don't know what a schedule is)

- every day if you are good I will bring you a tattoo or a peice of candy (you choose) (I will give an example)

- give schedule each day explain

- do's and Don'ts

- rules

- have them help me

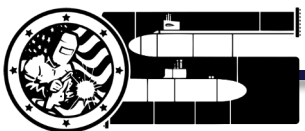




Expectations



- **What do you expect from your Leader?**
- **What can your Leader expect from you?**
- **What do you expect from your Team?**
- **What can they expect from you?**

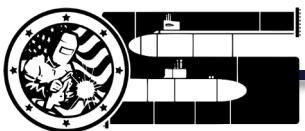




Team Expectations



- **What does your Customer expect from you?**
- **What do you expect from your Supplier?**
- **What do you expect from your Teammates Support Leaders? (Engineering, Supply Chain, Quality, HR, etc.)**
- **What can they expect from you?**

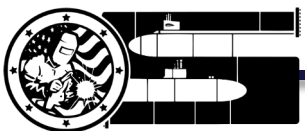




Trust



Earned or Given?





High Performing Teams Require TRUST



Leader will provide...

- **Clear direction**
- **Appropriate Resources**
- **Expert Advice**
- **Feedback and Coaching**
- **Growth Opportunities**
- **Reward and Praise**
- **Fair Treatment**

Led will...

- **Treat the company like their own**
- **Hold each other accountable for doing the right thing**
- **Give early warning of problems**
- **Have the courage to ask questions**

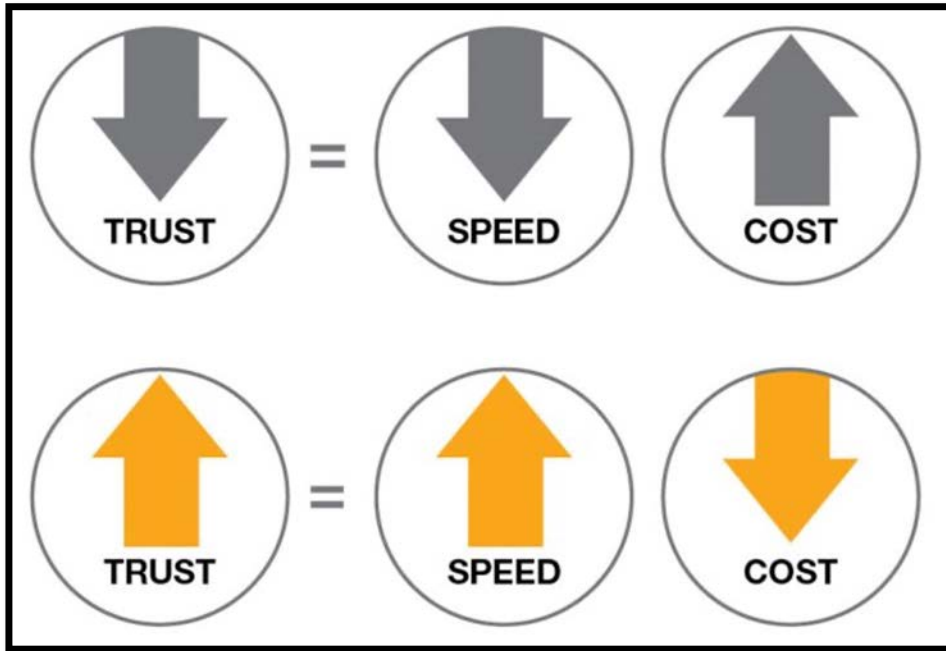




Trust = Speed & Reduced Cost – Trust Matters



- Exists in very personal, irrational, and operationally volatile terms between the Leader and the Led
- Trust is a function of Situational Awareness and Instinct



Take communication...In a high trust relationship, you can say the wrong thing and people will still get your meaning.

In a low trust relationship, you can be very calculated in what you say and still be misinterpreted.

*Lack of trust is a tax on everything!
It feels like wading through sludge because it is.*





Signs of Engaged Relationships



- High Trust
- Low Task Definition Needs
- High Relationship Needs
- Psychologically committed to the company
- Consistent levels of High Performance
- Innovative and a drive for efficiency
- Intentionally build supportive relationships
- Clear about role outcomes expected
- Passionate, high energy, and enthusiastic
- Never run out of things to do
- Loyal to workgroup and company
- Broaden what they do and build on it
- Positive constructive criticism

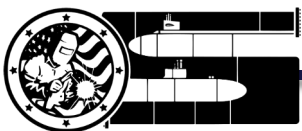




Signs of Dis-Engaged Relationships



- Meeting the Basics
- Confusion or inability to act with confidence
- Low risk response
- No real sense of achievement
- Making up their own game
- Not always committed
- Show negativity but not underground
- Situationally Engaged





Signs of Actively Disengaged Relationships



- **Low Trust**
- **High Task Definition Needs**
- **Low Relationship Needs**
- **Physically present but psychologically absent**
- **“What can I take” rather than “what can I give”**
- **Share unhappiness about work with peers**
- **“I’m OK but everyone else is not”**
- **Service prevention rather than service provision**
- **Not productive but always has excuses**
- **Inability to move from problem to solution**
- **Normal reaction starts with resistance**
- **Low commitment to company**
- **Might sabotage or manipulate solutions**
- **Isolation, low trust**





This is the behavior of what type Relationship?



1. Engaged
2. Disengaged
3. Actively Disengaged





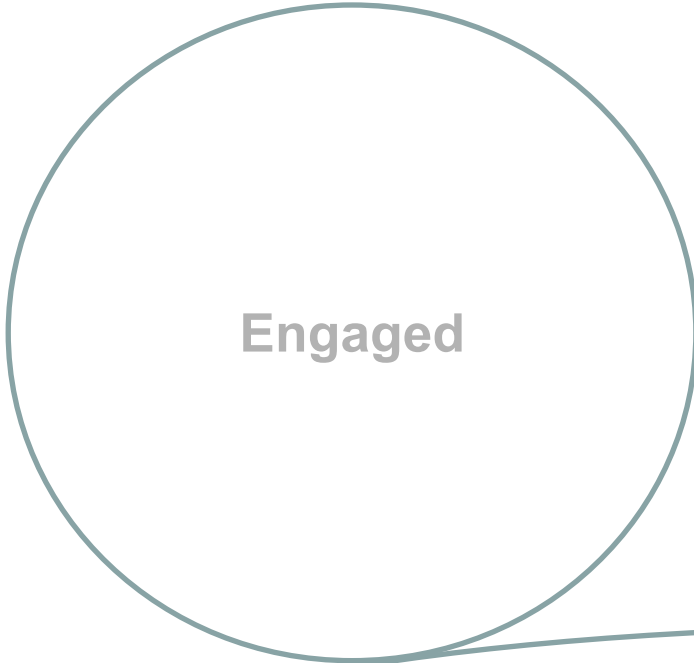
Team

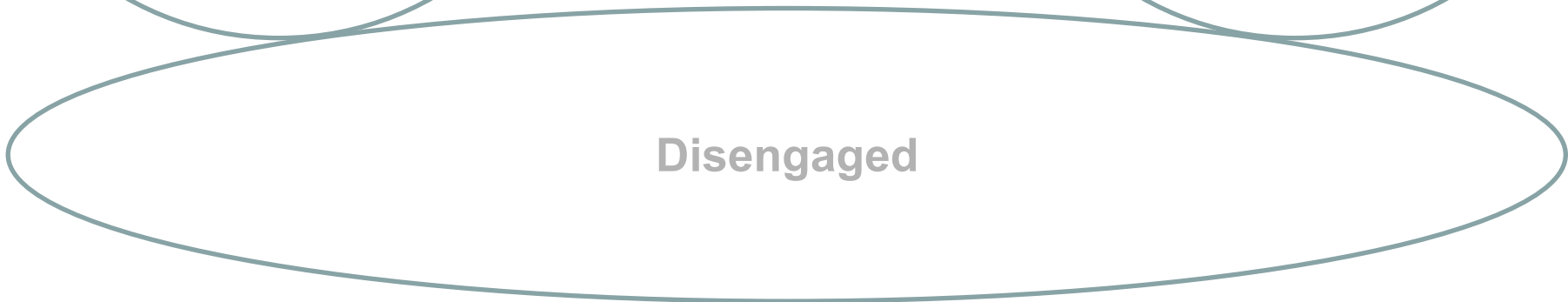
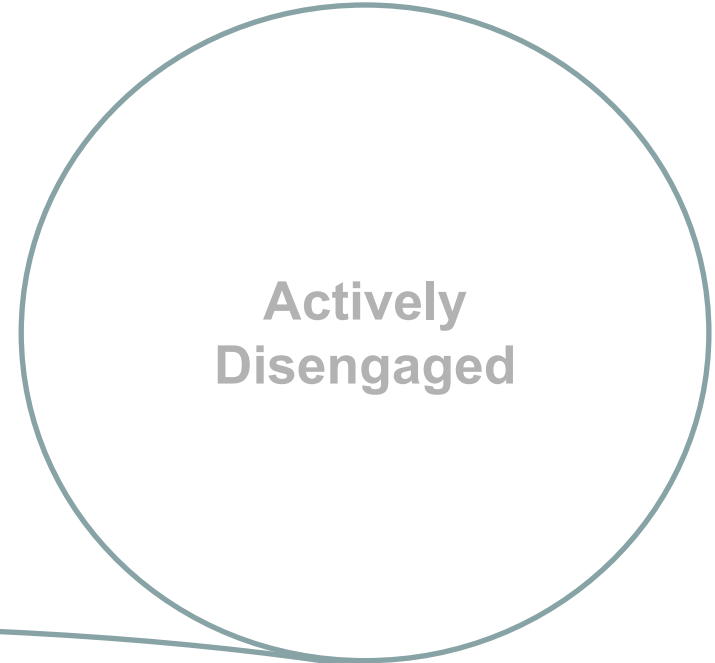
Leader: _____

TEAM ROSTER

Date: _____

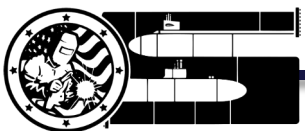
(Led)







Who owns employee engagement?





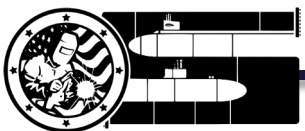
Developing an Engaged Team Strategy



- Increase the Engaged Group
- Eliminate the Actively Disengaged Group

Facts:

- Little movement from Actively Disengaged to Engaged
- More movement from Engaged to Actively Disengaged due to Leaders breaking the Goal Alignment Contract/Agreement





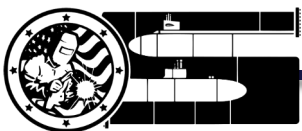
The Key to Success: Disengaged Group



1. **New Employees** make a **decision** within first 48 - 72 hours from introduction to immediate supervisor.
2. **Dis-Engaged Employees** are those “...just putting in my time” but not actively doing harm. They may be **Situationally Engaged**. They can be influenced by Leaders and their Engaged Teammates.

Strategy:

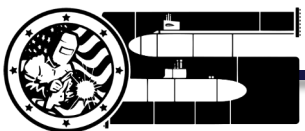
- Focus on the Disengaged to move them into the Engaged Group as quickly as possible.
- What is your plan to create Engaged teammates? One at a time!





**Who is your Most Engaged
person on your Team?**

And who knows?

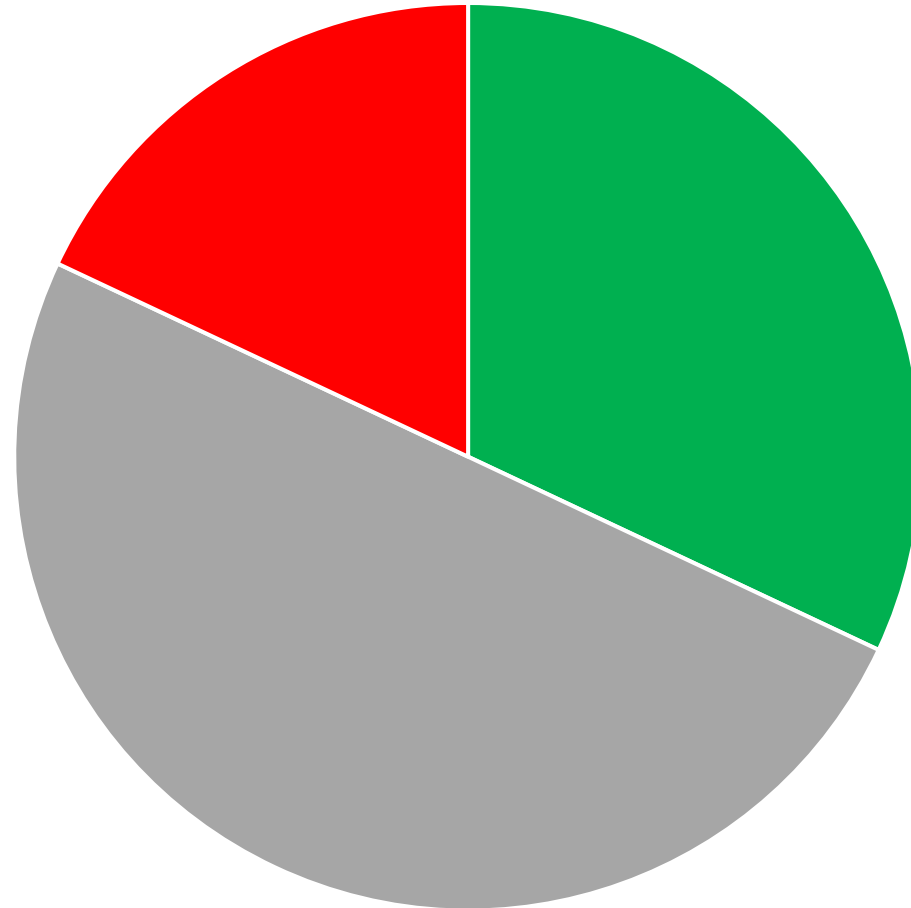




2021 Industry Overview



25% of the working population are ignored by their supervisor



■ ENGAGED ■ DISENGAGED ■ ACTIVELY DISENGAGED ■

Source: Gallup





Team: _____

Leader: _____

TEAM ROSTER

Date: _____

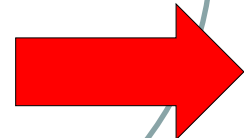
(Led)

Retain by Continuous Goal Alignment

Engaged

Placed Outside of Team by Leveraging Normal Churn Opportunities

Actively Disengaged



Disengaged

Move to Engaged Group by High Touch/High Contact/High Communication and Deliberate Matching





So What...

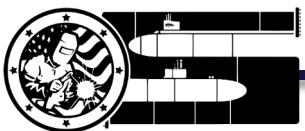


**We MUST teach, coach,
practice and measure the
Leader's responsibility for
improving
Team Engagement**





What is the impact of **ENGAGEMENT** on Business Performance?





Higher Engagement = Earlier Gives



- **22% Higher Profits**
- **43% More Productivity**
- **37% Higher Sales**

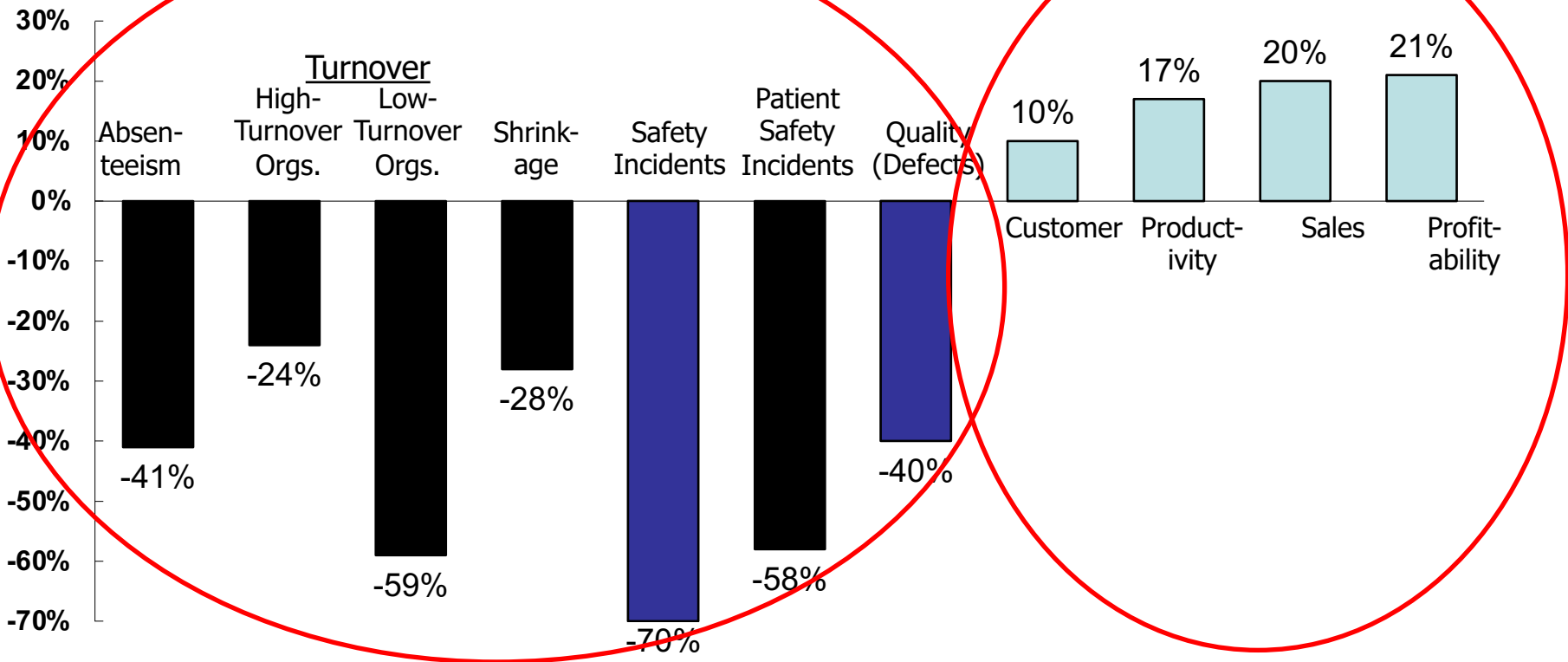




Why Do We Care About Engagement?



The Business Impact[®] - Highly Engaged Teams Perform Better



Business units in the top engagement quartile generate 40% fewer defects and have 70% fewer safety incidents than their bottom-quartile counterparts.

source © 2009, 2016 Gallup, Inc.





Summary



- **The goal is to create organizational alignment**
 - Led knows what Leader wants, Leader knows what Led wants
- **Clarity of expectations builds trust**
- **Trust is GIVEN**
- **Where there is trust, Good Things follow**
- **COMMUNICATIONS is the KEY**
- **These tools are only useful if they become an everyday part of the life of the leader**
- **The Circles Chart is a visual aid for a leader to drive conversation with their Leader and seek help/support**
- **Are YOU Engaged?**
- **Can we ever allow a Leader to be Disengaged or Actively Disengaged?**
- **Leaders OWN the engagement of their team.**

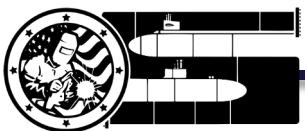




ELO: Best Practice Retention Process Steps

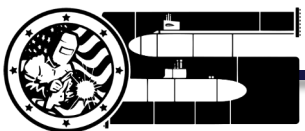


- **Navigator Check Ins**
- **30 | 60 | 90 Reviews**
- **1st Year Retention**





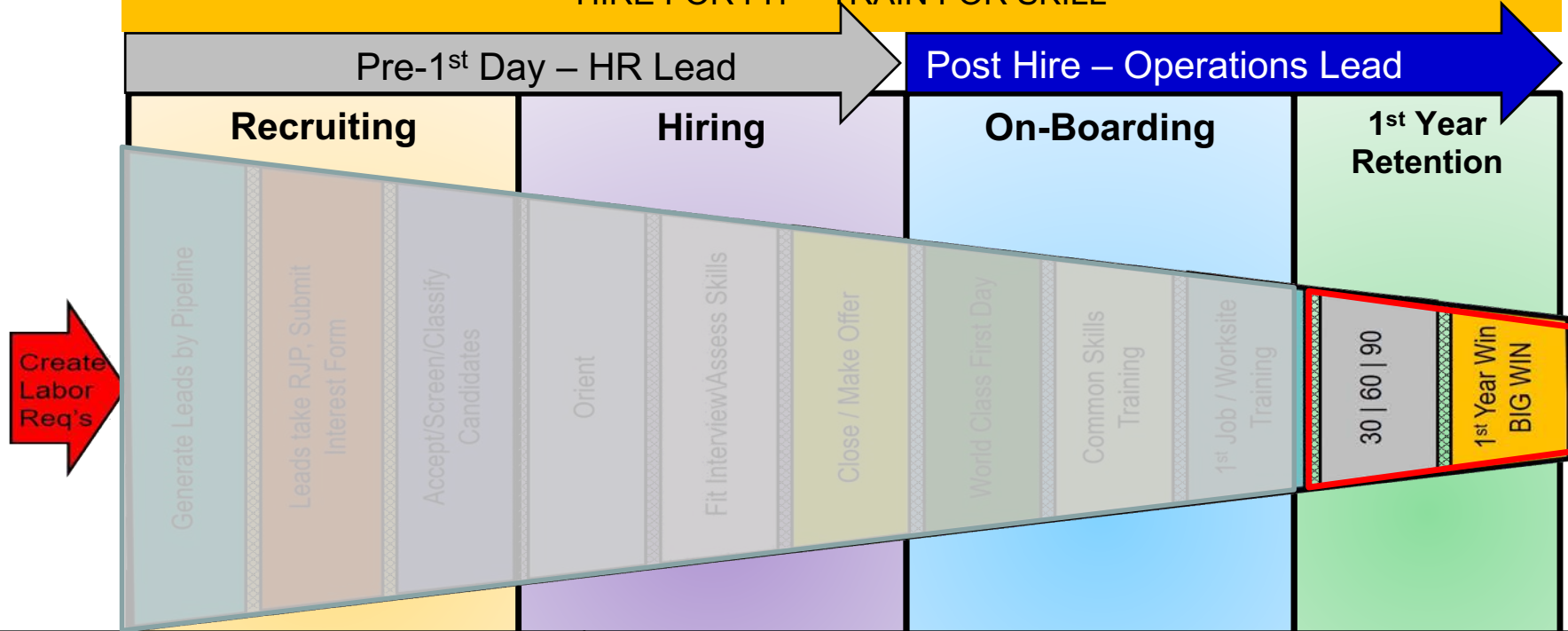
Who owns retention?





Best Practice Model

Perfect Process: 1 Recruit = 1 Life Long Engaged and Productive Teammate
 HIRE FOR FIT – TRAIN FOR SKILL



Pipelines

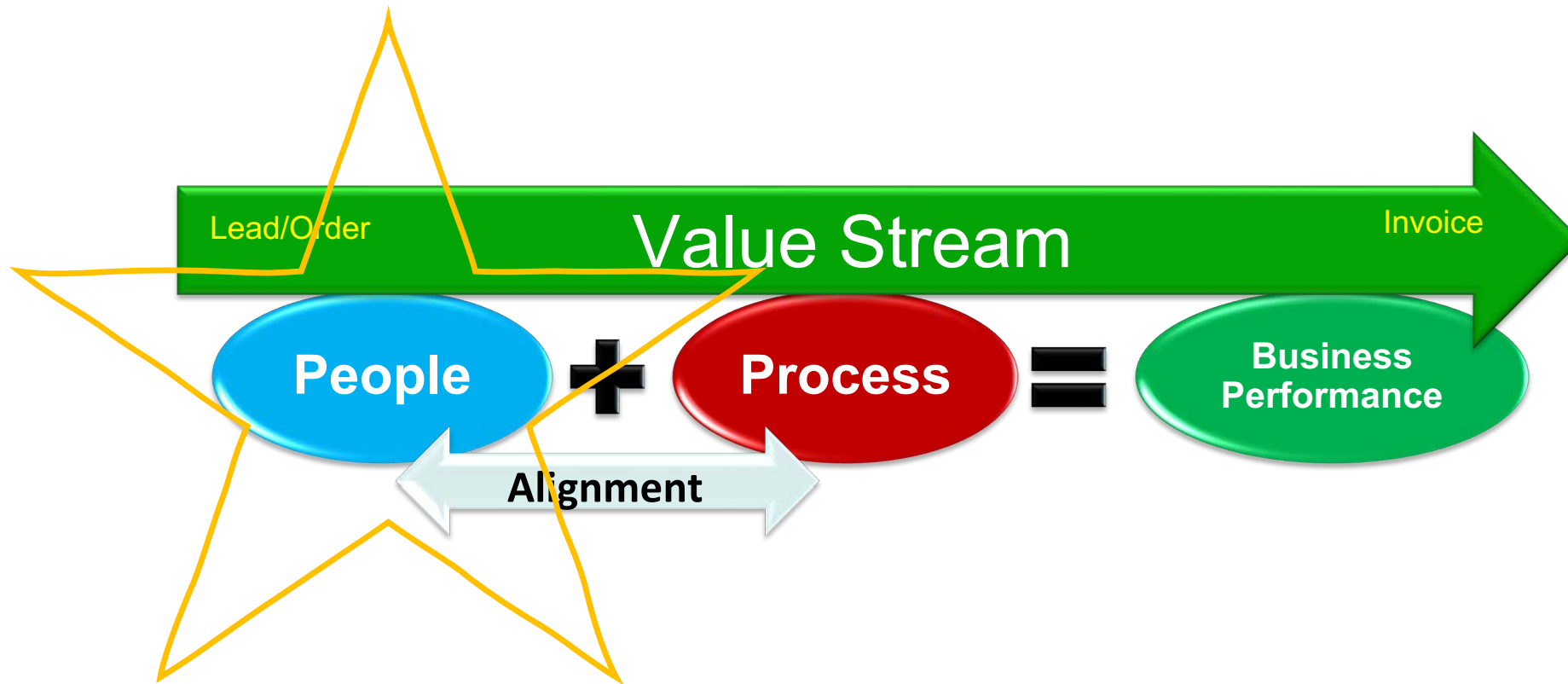
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|--|----------------------------|
| 1. Training Providers (CTE Programs, etc.) | 7. Social Media |
| 2. Employee Referral Program | 8. Recruiting Agencies |
| 3. ATDM | 9. Military & Veterans |
| 4. College Departures | 10. Employment Commissions |
| 5. Adult Education | 11. Recovered/Returns |
| 6. Temp Agencies | 12. Retiree's |

Tools

- | | |
|---|---|
| 1. TA&R Value Stream Mapping and Performance Improvement Plan Development | 7. Common Skills Training |
| 2. Internal Recruiter Training | 8. Leader Training |
| 3. Realistic Job Preview & Candidate Tracking System | 9. 30-60-90 day & 1 Year Fit/Skills Assessment |
| 4. Recruiting & Offer Day/New Hire Orientation | 10. 5th Metric "People" Scorecard Data Driven Program Management System |
| 5. Behavioral Based "Fit" Interviews | |
| 6. World Class First Day | |



Big Picture Thinking



How do we measure and communicate?





Retention Process



Executive Summary: The objectives of Navigator Check In's are early risk identification, leader feedback validation, and to provide a 3rd party outlet to encourage candid feedback on the process. The New Teammate Navigator should be someone outside the direct chain of command and completed at the end of Week's 1, 3 and 5.

Supplier	Input	Process	Output	Customer
Navigator Direct Leader New Teammate	L2 Power 9 Questions New Hire Intakes	Navigator Check In's	Feedback New Teammate Engagement	Direct Leader HR / Training Mentor

Action/Process	Role				
	Navigator	Direct Leader	New Teammate	Mentor	HR/Training
Navigator Check In	R	S	S	I	A


Tools / Supporting Resources: L2 Power 9 Questions, Navigator Check In's





Navigator Check In's Example



 **Power 9 Questions**

Leader's Name: _____ Operator's Name: _____ Date given: _____

SA – Strongly Agree A – Agree D – Disagree SD – Strongly Disagree

- I know who my leader is

SA	A	D	SD
----	---	---	----
- My leader trusts me

SA	A	D	SD
----	---	---	----
- I understand what we do and how we make money

SA	A	D	SD
----	---	---	----
- I know what to do at work everyday

SA	A	D	SD
----	---	---	----
- I have the materials, tools, and equipment to do my work correctly

SA	A	D	SD
----	---	---	----
- I know how to do the work correctly the first time

SA	A	D	SD
----	---	---	----
- I know my role, the roles of my teammates and how we work together as a team

SA	A	D	SD
----	---	---	----
- My team and I know the score and we play to win everyday

SA	A	D	SD
----	---	---	----
- My leader cares about me as a person and wants to help me be successful

SA	A	D	SD
----	---	---	----

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New Teammate Intakes

- Do you feel that the World Class First Day was helpful?
- Has your Leader gone over their expectations with you? If so, what are some things they expect from you?
- When was the last time you talked with your leader?
- Do you know what to do at work everyday? Is someone helping you?
- Is there anything that you need that you're not getting?
- Is there anything you know now that you wish you would have known on your first day?





Retention Process



Executive Summary: The objectives of the 30-60-90 Day Fit and Skills Review are to provide and solicit constructive feedback, foster engaged Leader to Led relationships and identify areas of risk and align resources to mitigate risk. Fit and Skills Review is focused on Performance Habits, Work Habits and Productivity

Supplier	Input	Process	Output	Customer
Direct Leader Mentor New Teammate Leader's Leader	Assessment	30-60-90 Fit and Skills Review	Goal Alignment	HR New Teammate

Action/Process	Role				
	Direct Leader	Leader's Leader	Mentor	New Teammate	HR
30-60-90 Fit and Skills Review	R	A	S	S	I

Tools / Supporting Resources: Fit and Skills Review





Measuring & Giving Feedback



■ Performance ■ Work Habits ■ Productivity ■





30-60-90 REVIEW Example – Performance Levels



Performance Levels	Review Period				
	30	60	90	180	365
Safety <i>Correctly uses required PPE.</i> <i>Keeps clean work area with clear line of egress.</i> <i>Demonstrates knowledge of Company safety procedures.</i>	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
	30	60	90	180	365
Attendance and Punctuality <i>Shows up on time and ready to work every day.</i>	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
	30	60	90	180	365
Produces quality work <i>Ensure products and services meet or exceed production standards. Meets productivity standards for their job.</i>	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
	30	60	90	180	365
Training and Development <i>Pays attention to instruction and shows continuous personal improvement</i>	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
	30	60	90	180	365





30-60-90 REVIEW Example – Work Habits



Work Habits	Review Period				
Demonstrates respect for other employees. <i>Shows courteous regards for others.</i>	30	60	90	180	365
	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
Demonstrates adaptability. <i>Adjust activities or behaviors as required by changing job circumstances. Able to perform assigned tasks and demonstrates the skills necessary to be productive in the workforce.</i>	30	60	90	180	365
	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
Demonstrates dependability <i>Demonstrate consistent, reliable performance and behavior.</i>	30	60	90	180	365
	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
Demonstrates initiative in the work place <i>Do what needs to be done without prompting.</i>	30	60	90	180	365
	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1





30-60-90 REVIEW Example – Work Habits



Work Habits	Review Period				
Demonstrates integrity <i>Behave in an honest and trustworthy manner.</i>	30	60	90	180	365
	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
Asset Management <i>Use organization's materials and property wisely.</i>	30	60	90	180	365
	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
Recognizes that he/she is a member of a team <i>Strive to satisfy the expectations of internal and external customers.</i>	30	60	90	180	365
	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
Time Management <i>Use own and others' time effectively</i>	30	60	90	180	365
	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1





30-60-90 REVIEW Example – Productivity



Productivity			Strengths	Opportunities
30 Days				
NS	WI	CT		
60 Days				
NS	WI	CT		
90 Days				
NS	WI	CT		
180 Days				
NS	WI	CT		
365 Days				
NS	WI	CT		

NS – Needs Supervision (Disengaged)

WI – Works Independently (Engaged)

CT – Can Teach Others (Engaged)





Retention Process



Executive Summary: 1st Year Retention involves continual engagement and goal alignment between the New Teammate and their Direct Leader. It is the responsibility of the direct leader to lead, track, and develop his or her New Teammates and the 5th Metric Scorecard provides the structure to communicate and drive data driven decisions on a monthly basis.

Supplier	Input	Process	Output	Customer
Direct Leader Leader's Leader Senior Leaders HR/Training	5 th Metric Scorecard	1 st Year Retention Monthly 5 th Metric Discussions	Informed Data Driven Decisions	The Organization

Action/Process	Role			
	Direct Leader	Leader's Leader	Senior Leaders	HR/Training
5MSC Reporting	R	S	A	I
5MSC Data Compilation	S	R	A	I
Monthly 5MSC Meeting	S	R	A	I

Tools / Supporting Resources: 5th Metric Scorecard, Circles Charts, Engagement Behaviors





5th Metric Scorecard



Month: December

Leader: K. Barto

Team Snapshot			
Metric	Value		
Total Headcount Start Number from the End of Last Month	10		
Minus the Number of Teammates Who Departed	- 2		
Plus the Number of New Teammates	+ 3		
Total Head Count End	11		
Team Engagement	E: 7	D: 3	A: 1
Number of Open Positions	3		
New Hire Snapshot			
Total New Hires (Less than 1 Year)	4		
Needs Supervision (#)	3		
Works Independently (#)	1		
Can Teach Others (#)	0		

Names of Teammates Who Departed	Position	Date/Reason	Names of New Teammates	Expectations & 1on1 complete?	Start Date
William Patterson	Welder 3 Class	11-Dec / Attendance	K. Johnson	Yes	12/4/22
James Caelen		29-Dec / Family-Relocation	S. Harris	Yes	12/4/22
			E. Hotel	Yes	12/15/22





Monthly 5th Metric Reporting Example



- **Week 1:**
 - 1st Line Leaders to Supervisors

- **Week 2:**
 - Supervisors to Managers

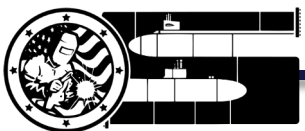
- **Week 3:**
 - Managers to Executive Leadership Team via Monthly 5MSC Meeting





At the end of the day, Retention is about....

Leadership

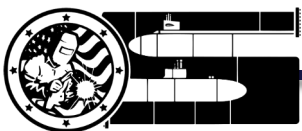




The greatest form of respect we can give our PEOPLE is a Leader who...



- **Wants to Lead**
- **Demands to be Held Accountable**
- **Is Engaged**
- **Knows What Right Looks Like**
- **Has a Leader Who Will Help Them Become a High Performer**
- **Plays to Win Everyday!**

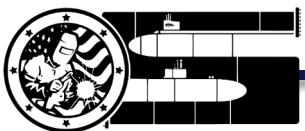




Summary



- **Leaders OWN retention**
- **Goal is to build ENGAGEMENT which leads to PERFORMANCE**
- **Communication is the key to success**
- **Requires application of consistent leadership tools and processes**
- **Training providers should care about 1st Job SUCCESS**





ELO: Talent Pipeline Reporting Requirements



- **Monthly Screened Candidate/Offers/Accepted Offers Reporting**
- **Monthly New Hire Reporting**
- **Monthly Retention Reporting**





Monthly Screened Candidates/Accepted Offers Reporting



Ben Franklin High School							
	Program	Capacity	Instructor	# Enrolled Seniors	# Screened Candidates	Completion Date	# Accepted Offers
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							

EXAMPLE





Monthly New Hire Reporting



American Hydro																			
Pledge	Welder - 1	Machinist - 1	Metal Fabricator - 1		Total:	3													
# Offers Extended:		# Offers Accepted:		# Started Employment:															
Employment Status																			
	Employee Last Name	Employee First Name	Start Date	Termination Date	Pipeline	Jul '22	Aug '22	Sep '22	Oct '22	Nov '22	Dec '22	Jan '23	Feb '23	Mar '23	Apr '23	May '23	Jun '23	NOTES	
1																			
2																			
3																			
4																			
5																			
6																			
7																			
8																			
9																			
10																			
11																			
12																			
13																			
14																			
15																			
16																			
17																			
18																			
19																			
20																			

EXAMPLE





Monthly Retention Reporting



Employer:		Billet Industries														NOTES
Employee Last Name	Employee First Name	Start Date	Jul '22	Aug '22	Sep '22	Oct '22	Nov '22	Dec '22	Jan '23	Feb '23	Mar '23	Apr '23	May '23	Jun '23		
1 Spahr	Matthew	5/24/21	X	X	X	X	X	X								

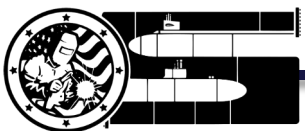
Please enter a "X" in Column "K" (Jan '23) if the employee is still employed, otherwise leave blank and comment in the "NOTES" column as to why the employee left or was terminated.

EXAMPLE





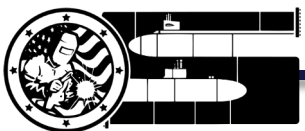
Open Discussion (Issues/Available Help)





Next Steps/Closing

Bruce Warner





Path Forward



- **Understand the realities of your specific challenges**
- **If needed, gauge your Organizations willingness to change**
- **Request an On-Site Assessment and Customized Workshop**
- **Leverage our Services to support as needed**
- **Attend the March 7th Recruiting Fair**
- **Recruit, Hire, Report!!**





Signing Day: Employer Focus



➤ Retention (Pilot Employers):

We are pleased to announce our Pilot candidates some of whom are here tonight. (Names on the slide behind.)

➤ Hiring (All Employers):

This year we are pleased to announce we have ___ Accepted Offers from the following Talent Pipelines. (Announce the pipelines used.)

➤ Pipelines (All Employers):

We especially want to thank our Talent Pipeline Partners. (Announce all Training Providers used.)

➤ Pipeline Program (All Employers):

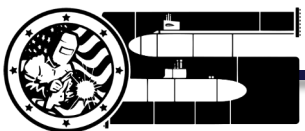
The Talent Pipeline Program has helped our business by _____.
(Announce the ways the Talent Pipeline has assisted in making your business better.)





Core Outcome Metric

of EMPLOYERS with a reliable year over year Talent Acquisition and Retention Pipelines to run a better business and increase defense industrial capacity.





WE are on a Mission!

1 Employer

1 Job

**1 Lifelong, Productive,
Engaged Teammate at a Time**

