



**Notes Template for Facilitators – Fall 2020 Business Round Tables**

**Topic: Employee Engagement and Retention**

Facilitator: **Pat Klima**

Number of participants: 11

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Re hiring – use of co-ops and mentorships allow for a prolonged evaluation of a prospective employee. Sometimes difficult to keep them professionally challenged (maybe as a COMET tech) and that makes it challenging to have a significant hire rate.
2	Re hiring – word of mouth and referral bonuses result in good hires. Win/win/win. Referring employee gets a bonus, referral gets a job, company gets an employee that comes with a strong recommendation from one of its own.
3	Re hiring – in general, hire passionate employees over technical employees. We can teach someone anything, with the exception of passion and work ethic..
4	Re retention – Mentor, mentor, mentor. Provide all employees with professional development and advancement plans.
5	Re retention – feedback to employees about their performance, and more importantly their career path is imperative. Most of our panelists did this once to twice per year. Some had neat tools such as playing cards to assist with the evaluation process. Only 1 did surveys.
6	Re retention – aggressive compensation helps people stay. Mid-year bonuses, profit sharing, and other tools to economically incentivize people is used extensively by one of the group.

Topic: Employee Engagement

Facilitator: **Ben Crawford**

Number of participants: 11

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	<u>Mentioned bonus program</u> , tied to growth and profitability. The firm that does this seems to understand how this works. Large firm uses this, 1,900 staff with about half of the firm is field technicians. They mention that it can be stressful as you see the numbers role out. Use a robust software system.
2	110-person firm, they have a formula that they use. Some subjective things that go into the formula as well as metrics. They mention that the formula is not well liked.
3	<u>How does your hiring process ensure a good fit?</u> Try and have a couple people in the interview. Mentioned personality test, screening tests. One of the larger firms mentioned using it in the past. The group agreed very difficult process. What have they done in college to show leadership and drive? Trying to ID work ethic.
4	Referral program has been very successful for Derek's firm, they are smaller firm. They pay out a bonus to the staff who brings in a new employee and they last for a certain amount of time. Internal recruiting team to help grow the firm. Discussed using indeed but the issue with getting applications that don't fit at all.
5	<u>Employee Surveys.</u> One person mentioned that they completed one of them and it was very eye opening. A larger firm mentioned that they have completed a survey as well. Discuss employee review feedback. Some training programs allow to hear feedback. Seems like there is a fair amount of individual feedback. Larger surveys can result in airing of the dirty laundry. Considering having one and one feedback with someone other than the direct supervisor.
6	<u>Turnover:</u> Staff sometimes burned out and left. Trying to stay in touch with your staff to see how they are doing. Discussed career paths and making sure that this allows people to see where they can go.

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Hiring is difficult and so very important. Referral programs can be good. Multiple existing staff should sit in on the interviews.
2	Surveys should have a one on one element. Large survey monkey questions can have unintended consequences.

Topic: Employee Engagement / Retention

Facilitator: Steve Wendland

Number of participants: 12

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Positive engagement starts in the recruiting process. During the recruiting and interview process, it is important to be upfront, transparent, and honest with a potential employee regarding expectations that will be placed on them and resources that will be available to them. This includes discussions of expected travel, opportunities for advancement, training provided, and revenue goals for them.
2	Referral bonuses for existing employees that help with recruiting are effective. Most firms pay \$1000 to \$2000 for a referral that leads to a successful hire.
3	During recruiting, get input from a variety of staff at a variety of levels (entry level to senior) to help evaluate whether a potential employee is a good cultural fit for your company.
4	Don't forget that every employee is a person, not just a source of revenue. Make sure you're communication and meetings includes personal interaction (chit chat, family news). During the pandemic it is helpful to have meetings among employees that are entirely focused on non-work related topics (how's you're kid's softball team doing?)

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Make time to have personal communication with your employees; interaction and communication should not always be 100% work focused.
2	Honest and transparent communication during the recruiting process avoids engagement issues later on.
3	Remote working (working from home) has become a permanent feature of our work environments; we must adapt to this new reality.

Topic: Employee Engagement and Retention

**Facilitator: June Jewell**

Number of participants: 11

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	There has been a drop in morale with the remote workforce. Some firms trying to get employees to come back to office to build morale.
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2	Many firms have not done engagement surveys
3	Technology allows us to see each other more often face to face and more times per day
4	Need to set boundaries between work and home life
5	Some people consider working at home as a benefit
6	Question – will enabling employees to work at home be expected post-covid?
7	Need to set clear expectations on employee home office benefits. What do we give them? Do they get a home office allowance? Take equipment home? Some firms bought two sets of equipment to enable them to go back and forth.
8	Worried about the winter and holidays – will morale get worse?
9	Need more intentional outreach to staff. Managers may need daily checkin

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Maintaining morale is most important thing to firm leaders. They are worried about staff and want them back in office if possible.
2	Productivity for working at home is working out better than expected.
3	Future will look very different and some employees will never come back to office full time. See how this can be a benefit to both employees and the firm.

Topic: Employee Engagement/Retention

Facilitator: Tiffany Vorhies

Number of participants: 11

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Attracting the <u>right</u> talent - Bring interviewee in, try and have them engage with many people at different levels. That helps with organizational culture. Interview across groups to get different perspectives.
2	Get younger staff involved in University recruitment. They also help vet the candidates ahead of time. ... need to take the time to help train those recruiters. ... these staff will also be working with them for years to come, so it is good to have them make sure they interact well and be part of the hiring process.
3	References from existing employees is huge for bringing in the right candidates. Get staff out networking. Encourage staff and train those who might not be comfortable. Push people to do this, because they aren't always comfortable or don't think it is their job.
4	We need to figure out new ways to recruit and engage....Need to engage regardless of covid and election. We need to always be recruiting. ... one firm was slowing on hiring then got slammed with work. Keep recruiting and looking for good people, even if we are worried about work being there. Set up space for everyone to feel safe back in offices so they can engage with new recruits (offices where possible instead of cubes)
5	To get the right culture - Tell staff that they will get dirty, or whatever your 'ugly' is. That will help with the culture. They need to know some of the bad side right away to help weed out those who don't fit.
6	Managers need to proactively engage with staff. If you are in the office, make a point of visiting others in the office versus just worrying about getting that report out. Schedule time to proactively interact with staff virtually. Weekly or bi-weekly check-ins.
7	For engagement in these times - Weekly, bi-weekly, or monthly all company call. Message direct from president so everyone knows what is happening, health of the company, expectations, and timely covid or other updates.
8	Flexibility is number 1 for engagement right now. We discussed nudging but not forcing employees to come back. Some want to and some really love their new world. Others can't come back due to personal requirements at home. Employers need to work with staff to be flexible but set reasonable expectations. For example, some technical staff may not need or require interaction... but if you hire a new junior staff, the senior person may be required to come in and intentionally interact.  There were also positives though, because people are interacting across office more than before.

9	Consider monetary bonuses for above and beyond hours or situations. Eg. \$50 gift cards that staff can award to each other. Bonuses for lab overtime if volume is considerably high and staff don't get excited about the overtime pay itself.
10	Right now we need to look at our companies and think of innovative ways to keep comradery going.

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Right now we need to look at our companies and think of innovative ways to keep comradery going. Especially with holiday parties being cancelled and other interactive events cancelled. Depending on size or other situations, figure out ways for staff to engage with each other and how the company can send the "thank you" that they normally would at those events. Don't force in person if people aren't comfortable, but allow if they are, and engage those who aren't.
2	<p><u>Flexibility</u> is number 1 for engagement right now. We discussed nudging but not forcing employees to come back. Some want to come back, some really love their new world, some are scared to come back, and some can't because their world has changed. Don't make assumptions on what they need/want and don't force them.</p> <p>Employers need to work with staff to be flexible but set reasonable expectations. For example, some technical staff may not need or require interaction... but if you hire a new junior staff, the senior person may be required to come in and intentionally interact.</p> <p>There were also many positives though, because people are interacting across office more than before. We need to highlight this and find ways to cross train across offices and utilize the tools we now have.</p>
3	Don't stop recruiting. Get younger staff involved in University recruitment. They also help vet the candidates ahead of time. Make sure to train those recruiters. They will be working with the new staff longer than the current managers and have a good feel for the types of people that will fit well. Get them engaged in hiring.

Topic: Employee Engagement/Retention

Facilitator: Jeff Jaros & Ed Jackson

Number of participants: 11

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Lab facilities have been challenged and had to implement physical controls as remote working was not an option. Widely varying attendance. 30-75% average attendance in offices
2	Multiple initiatives to maintain social aspects (e.g. Trivia), brunch and brag. Proactive structured and more frequent meetings.
3	Starting to evaluate longer-term reduced attendance “who is not coming back”. Foresee challenges with mentoring and coaching as an impact of remote extended remote working
4	Integration/onboarding of new hires is challenging, depending on type of role. Particularly for senior hires.
5	Engagement: Various approaches (surprise gift packages on Labor Day, thank you cards), virtual social events (scavenger hunt), employee appreciation week. Encouraging supervisors to proactively reach-out. Virtual Holiday Events with third-party organizers. Nominating charitable donations. Third-party workplace social apps (Motivosity) for peer-to-peer recognition.
6	Field Staff engagement presents different challenges. In some ways, largely unimpacted by COVID-19 as most field activities are essential critical infrastructure workers. 20% temporary compensation increase for people that were being asked to continue to work onsite/labs.
7	Retention: Increased mobility in workforce as a function of more remote working, moving towards non-geographic team structures (spread-out). Apprehension by some candidates to make a change and join a new company given economic uncertainty. Some have seen more turnover than expected, particularly employees who travel or field staff (partially COVID exposure concerns)

Summarize the three most important items from the discussion that should be shared with GBA members:

1	A structured approach to communication (with multiple virtual alternatives) is needed to compensate for the gaps in formal and informal office-level interactions between colleagues, direct reports, peers, and mentors, that have resulted from reduced attendance in offices. Best practice approaches included: increased staff meeting frequencies, planned 1:1 calls with co-workers and mentees, virtual social events (make it fun, varied and get creative). Overall: recognize the communications gaps and be proactive and adaptive in finding solutions.
2	Engagement: Impacts to employee engagement varied widely as a function of functional role and extent of remote working i.e. field staff were generally less impacted as the field activities have largely continued (same as before), whereas office based employees were more impacted, depending on the level of reduced attendance in their home office. Engagement is challenging with no silver bullet solution.

3	Retention and talent acquisition: Attrition impacts varied, with some staff leaving due to personal concerns relating to COVID but overall, the sense was that attrition was generally not impacted. Hiring was mixed with some hiring by most companies. Challenging to integrate new hires, particularly seniors. More remote working creates opportunities to work in non-geographics teams and casts the net wider for hiring talent who can largely work remotely.
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