Workforce & Succession Planning

A Roadmap for Workforce and Succession Planning

PennDOT: A Workforce Plan That Works

Data Is King in Workforce Planning

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“Avoid clichés” sits right near the top of the list of rules for writing well. Still, reading through this month’s articles and columns left me with little to say other than “fail to plan; plan to fail.”

Readers tasked with keeping their organization well stocked with talented employees surely know the truth of this maxim that is often attributed to Benjamin Franklin. But recognizing the problem and implementing solutions remain very distinct realities. To find the way forward, look no further than this issue of HR News.

Dick Heil, who serves as the principal facilitator of IPMA-HR’s workforce and succession planning course, lays out “A Roadmap for Workforce and Succession Planning Success” by outlining six essential factors and advising that human resources leaders first focus on workforce analytics and management readiness.

Importantly, the course Heil administers is modeled, in part, on a multiyear, multifaceted workforce planning initiative that the Pennsylvania Department of Transportation launched in 2012 and continues to refine today. John A. Soubik took a lead role in developing and carrying out the department’s programs to do things like increase internship opportunities, and he shares many examples for other agencies to follow in “Attracting and Maintaining Talent Through Organizational Realignment and Outreach.”

Next, psychologist Eric Frazer, Psy.D., brings the discussion back to first principles in “Start With Purpose to Sustain Top Talent.” He also sets out three successive steps that start with defining necessary skills and competencies, progress through investing in personalized professional development, and conclude with building a strong talent pipeline. Anvl CEO Robin Fleming closes out the features section by describing five ways to deploy digital technology for “Making Skilled Trades Safe and More Appealing to Younger Jobseekers.”

Staying very much on topic, debut columnists Katherine Barrett and Richard Greene use their inaugural B&G HR Report to deliver the message that “In Workforce Planning, Data Is King.” Confirmation comes from interviews with human resources managers who point to problems with the collection and quality of information on local government workforces, as well as from successful workforce planning efforts at municipalities that have addressed such problems.

Developing and maintaining a skilled and competent workforce pays off in many ways, one them being high employee engagement. Institute for Public Sector Employee Engagement Director Bob Lavigna, IPMA-SCP, illustrates this in his latest column. “Building World-Class Employee Engagement” focuses on the City of Henderson, Nev., and its progress toward achieving its vision of becoming America’s premier community.

Organizations that address workforce issues will also find it easier to change as circumstances demand. Andrew Rahaman, Ed.D., addresses this and the need for quality, continuous, reciprocal and face-to-face communication between organizational leaders and employees in his new Leadership Roadmap column. He specifically highlights the need to share information while recognizing the emotional component of change and in order to give employees ownership of change initiatives.

Wrap up your reading with one more rundown of recent relevant employment law cases in the Labor Relations column, and I’ll see you again in March.

Ed Lamb

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For the past several years, I have had the honor of facilitating the online and in-person versions of IPMA-HR’s Workforce and Succession Planning course. That experience has left me both encouraged and, at times, concerned about many of the responses I have heard or read from participants. The numerous stories of limited and more extensive success remain a decided minority. But I guess this is to be expected; otherwise, why would someone be taking the course?

The State of Planning

In the first section of the course, participants are asked to assess their organization’s readiness to move toward or expand their existing workforce and succession planning program while using a 3-point scale of high, medium or low. The factors they are asked to assess are

- **Currency of job data** based on job descriptions and surveys;
- **Recruitment strategies** deployed in response to changes in the nature of the workforce and in how applicants prefer to access the job market;
- **Workforce analytics**, particularly data on employee age and length of service by work unit and job classification;
- **Exit data**, particularly an analysis of major reasons employees leave their organization;
- **Management readiness** as reflected in senior management’s interest in and willingness to participate in a workforce succession planning effort; and
- **HR staff readiness** as reflected in the staff’s understanding of workforce and succession planning processes.

A noticeable pattern emerges from the responses to the assessments. Participants either feel very positively about the currency of job data, describing good data that has been recently updated with systems in place to maintain currency, or they paint a very negative picture. On that end of the spectrum, organizations are described as using job descriptions and job standards that have not been updated in years and as having no plan to change the situation.

While most participants say their organization has adapted its recruitment strategies to use websites and do online recruitment, participants from smaller organizations appear to be lagging behind due to funding challenges. Still, the imperative to move to more automated recruitment systems is felt across the board.

Developing and using workforce analytics appears to be an area of need. Most participants have some data, but they also say the data is not easily accessible or usable in its current format. Several participants do hope to obtain a human resources information system that will permit them to better collect, organize, analyze and operationalize data.

On the other hand, most organizations do have exit data. The problem here is that organization make very little use of the information.

Management readiness receives the least positive assessments. In many instances, course participants mention that HR does not have a seat at the table. When senior managers do demonstrate some concern, there tends to be a decided lack of ongoing interest or attention. Then, even when senior management does show sustained concern, line managers and supervisors remain largely uninterested and/or view the senior manager’s involvement as an intrusion into their areas of responsibility.

Last, while senior HR staff clearly understand the nature of the problem and show concern, it is not clear that all HR staff are knowledgeable about what workforce and succession planning requires. I have had HR directors in the course say that there will be a need to educate the HR staff as part of their action planning processes.

So, where does this leave us?

Having dealt with the development of workforce planning programs in both my public service career and as a consultant, I know that determining where to start can seem like an insurmountable hurdle. Obviously, making improvements in any of the six factors will be good.

My experience leads me to suggest first focusing on the workforce analytics and the management readiness factors. This is not to say that the other four factors are less important, only that they can be dealt with consecutively once data has been acquired and used to inform (some would say “scare”) the management team into understanding when and where the organization will suffer from a lack of workforce and succession planning.

Putting Data First

In regard to workforce analytics, gathering data for the last 2-3 years should suffice, although I have seen organizations go back 5
years. The information can then be used in concert with whatever exit data exists. The specific workforce data to gather are:

- **Age and length of service:** Public retirement systems typically require a combination of age and a minimum number of years to retire. Most employees will usually retire when they are eligible for both their pension and some level of Social Security and health benefits.

- **Job classification and work unit:** There may be critical jobs within the organization. IT comes to mind, but also engineering, physicians, trades, etc. I want to be able to pick out critical jobs and then be able to present data on discrete job classifications and job families. It is also preferable to examine individual work units because some, such as police and fire, may be more adversely affected than others.

- **Senior staff:** Often, the senior management staff has many years of service. Losing several members of this group could seriously impact organizational effectiveness and efficiency.

With this information in hand, it is time to inform the senior staff. Depending on what has been found, they will be a little concerned, ready to do something or, in the extreme, scared silly. I have seen the whole range of reactions. This is the point at which you can present a plan of action that is centered on the remaining four factors of job data, recruitment strategies, exit data and HR staff readiness.

Other equally important elements of workforce and succession planning will also come into play. These include issues like knowledge management, talent management and retention, talent pools and succession planning—just to mention a few of the strategies that may be needed to address long-range organizational needs. A final and important consideration is the development of an organizationwide communication program to inform staff of what is being done, as well as why and how things are being done. The messages should highlight long-term potential benefits to employees and the organization.

None of this is necessarily easy; if it were, everyone would be doing it. Also, it is not a trip with a clearly defined endpoint, but a journey that will not end any time soon. Remember that the last of the baby boomers will not retire till 2030.

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Calendar year 2019 was the first in which members of Generation X exceeded baby boomers as salaried employees at the Pennsylvania Department of Transportation (PennDOT). Out of 11,400 workers, 44 percent are Gen Xers, 34 percent are baby boomers, and 22 percent are Gen Y/millennials. Traditionalists and members of Gen Z combine to make up less than 1 percent of PennDOT’s workforce. While unassuming, these statistics guide where the agency workforce planner, recruiters and policymakers need to focus on workforce management.

For PennDOT, workforce planning, recruiting and retaining top talent are more than ambitious goals. The activities are essential to meeting the mission of sustaining Pennsylvania’s transportation infrastructure and roadway safety. With the state’s jobless rate down to 4.3 percent in November 2019, attracting candidates is more competitive than ever.

Charged with maintaining the nation’s fifth-largest state-maintained roadway system, the third-largest state-maintained bridge inventory, millions of license and vehicle transactions, and more, PennDOT is staffed by dedicated individuals who have a staggering range of responsibilities. To ensure the advancement of its overall mission to provide the highest quality transportation facilities and services possible, PennDOT relies on its most valuable resource, its employees, as the agency’s keystone.

Offering Training on Workforce Planning

PennDOT has long pursued a variety of initiatives to recruit, hire and retain workers. For example, the agency continues a robust paid seasonal internship program for college students, bringing on upwards of 1,500 interns each calendar year.

In addition, classifiers have revised job specifications, minimum experience and training requirements, and job-classification titles to meet the agency’s operational needs. Technical and soft-skills trainings are routinely offered to develop employees, and team members can take temporary assignments out of their job classifications to get a feel for higher-level jobs.

At the human resources and management levels, projected retirements were reviewed to determine where susceptibilities or gaps are likely to occur. Additionally, pay studies have been conducted and adjustments have been made in pursuit of parity with the private sector.

About a decade ago, PennDOT leadership recognized the need to go further and initiated a more aggressive workforce and succession planning program. In January 2012, a dedicated agency workforce planner was appointed and tasked with completing an overarching policy on workforce and succession planning that discussed definitions, job expectations and work performance standards.

Simultaneously, the workforce planner developed a classroom-based workforce and succession planning training course, as well as supporting resources. For six months, the planner traveled to each of the 11 engineering district offices across the state and to central office organizations in Harrisburg and trained 900 managers. To supplement the classroom training, a web-based training course was developed for use as a refresher and for bringing newly appointed managers and supervisors up to speed. In 2016, PennDOT’s training course and resources were shared with IPMA-HR, which utilized the material in developing its own workforce planning training module for all public sector HR professionals.

By John A. Soubik
Creating a School-to-PennDOT Pipeline

Building on the principles and concepts presented by Kimberly A. Helton and myself in a 2004 *Public Personnel Management* article titled “Pennsylvania’s Changing Workforce: Planning Today With Tomorrow’s Vision” and resources on career development, PennDOT recognized the need to reach out to students before they make decisions about which careers to pursue. One of the initiatives PennDOT developed was the School to Employment at PennDOT (STEP) program for high school seniors. The program launched in 2014 through collaboration with the governor’s office, legal office, Pennsylvania departments of Education and Labor & Industry, and unions. Through a paid internship of up to 12 months, the program introduces students to PennDOT’s operations by providing meaningful work assignments.

STEP students support a variety of PennDOT functions, including skilled trades, business activities and administrative work. Most STEP internships involve diesel mechanics and welding. STEP job opportunities are based on approved work requests prepared by hiring managers, resulting in the type and number of job opportunities varying by location within a given year. Generally, each spring, high school cooperative education coordinators are notified of STEP opportunities in their school’s geographic area. The co-op coordinators then invite students to apply. The accompanying chart summarizes STEP participation as of December 2019.

Since STEP’s inception during the 2014-2015 school year, 19 high school students have been hired into permanent positions, predominately in skilled trades. Another dozen STEP participants have progressed to a PennDOT college internship, and 39 college interns have moved into regular employment with PennDOT during this time. Further, both college and high school students are eligible to earn academic credits for participating in PennDOT’s intern programs.

A student outreach policy issued in 2017 expands student opportunities for exposure to the transportation industry through

- **Job Shadow:** Job shadowing provides an opportunity for high school, trade and college students to spend time with all levels of PennDOT staff. Students can observe PennDOT operations and determine if the work observed aligns with their interests and career goals.

- **Group Career Exploration:** This program is designed to introduce students from elementary through high school to PennDOT operations and careers by participating in various events that feature speakers, facility or job-site tours, and hands-on activities.

- **Tours:** PennDOT offers tours to students spanning third grade through college of its facilities, offices and construction sites and the opportunity to speak with PennDOT professionals.

By requiring the presence of a parent, legal guardian or school official during such events, collaborative relationships are built with families, schools and community members.

### Targeted Recruiting for Difficult-to-Fill Positions

While valuing the importance of exposing students to potential careers, PennDOT also recognizes the immediate need to attract candidates for existing openings, particularly for jobs that are difficult to fill. The agency has and continues to undertake initiatives to mitigate workforce challenges by doing all of the following:

- **Realigning workforce planning, recruitment and complement management into one section.** This arrangement enhanced the ability to identify and address workforce needs. A more recent reorganization changed the Recruitment Unit to include a section chief, unit supervisor, two full-time recruiters and two part-time recruiters who, respectively, serve as the seasonal programs coordinator and the STEP program coordinator. With this reorganization, the number of events covered increased by more than 55 percent between 2016 and 2017, more than 86 percent between 2017 and 2018, and more than 56 percent between 2018 and 2019.

- **Collaborating with the Pennsylvania Department of State to identify individuals who possess a certain license or certification, such as a real estate license.** Gaining access to that particular information enabled PennDOT to inform all licensed real estate agents of relevant employment opportunities through an aggressive letter campaign, resulting in a 31 percent increase in civil service lists for residential appraisers and a 25 percent increase in the number of Ukrainian complex.

### Table: STEP Participation

<table>
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<th>Fiscal Year</th>
<th>Work Plans Submitted</th>
<th>Total Students Hired</th>
<th>Minorities Male or Female</th>
<th>Females Non-Minority</th>
<th>Males Non-Minority</th>
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<td>299</td>
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2017-18 includes replacement hires that exceed the number of work plans. 2019-20 work plans continue to be filled.
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- Launching letter campaigns to candidates on the driver license examiner (DLE) list to inform them about DLE positions that require a commercial driver's license and related endorsements, as well as to potential candidates at trade and high schools to promote entry-level positions.

- Introducing an innovative approach to use civil service certifications for non-civil service jobs (CS/NCS crossover), such as diesel and construction equipment mechanic. Typically, the public is unaware that such jobs can be dually categorized. Therefore, announcement letters were issued to those on CS lists to inform them of NCS opportunities at PennDOT for the same job titles.

- Launching ambitious social media campaigns on Facebook, Twitter and YouTube that initially resulted in nearly 600 more applications than the previous year. Social media was also leveraged to target jobs in select geographic areas and for specialized qualifications.

- Publishing Career Pathway booklets on CDL positions, engineering, information technology generalists, real estate, summer employment and winter maintenance. The booklets are distributed at career fairs, available online and have been recognized by the Pennsylvania Office of Administration (OA) and other state agencies.

- Filming recruitment videos that spotlight the need to fill winter maintenance and CDL operator jobs. The winter maintenance video won the American Association of State Highway Transportation Organization’s award for Best External Video Production in 2017.

- Issuing the first Strategic Recruitment Plan in 2017. The plan is updated annually, and it identifies goals and workforce needs, chronicles accomplishments during the past year and summarizes recruitment resources, including women’s and diversity organizations.

Newer sources include job announcements in targeted publications such as trade magazines with multistate readerships and increased outreach to veteran organizations. Jobs are also posted online at PA CareerLink®, websites for engineering and other professional organizations, and at college and technical school career services offices.

Recruiters host onsite open houses and career days, participate in panel discussions and conferences, and increased their participation in career fairs at colleges, universities, high schools, technical schools and community, veteran, women’s representation, legislative and faith-based events. iPads issued to recruiters enable them to quickly demonstrate to job seekers at career fairs how to apply for jobs. Additionally, the recently created Recruitment and Community Engagement Tool enables recruiters to track, share and analyze data from recruitment-related events, including demographics for participants.

To promote the department’s initiative to increase women’s and minority representation in the transportation industry, recruiters increased participation in minority-focused recruitment events, diversified marketing materials and social media marketing, and became active participants in internal diversity, workforce and succession planning, recruitment, and retention and workforce sustainability visioning teams.

Additional recruitment methods include creating templates for print and radio ads and placing

- Ads on TV monitors in Driver & Vehicle Services centers statewide;
- Ads on tourist welcome center message boards and information monitors;
- Announcements on OA’s electronic bulletin board for employees; and
- Messages on digital roadside signs.

Recruiters have also created trifold brochures, job announcement flyers, easy-to-carry postcards and employee spotlight videos for www.employment.pa.gov.

Increasing Transportation Employment Opportunities for Everyone

Recruitment staff continually search for varied sources of potential applicants. Pennsylvania’s new employment platform invites candidates to disclose how they became aware of available jobs. This information allows recruitment staff to develop more strategic campaigns and target locations to increase cost-benefit rewards. Thus far, the state’s official employment website, friends/relatives, and commonwealth employees are the top three means of learning about jobs.

Encouraging Career Advancement

To foster internal advancement, PennDOT recently launched an online Career Development Plan (CDP) to enhance the paper process that was piloted in 2012. Using the CDP tool facilitates active discussions between an employee and their supervisor about the employee’s career interests and how to achieve career goals.

PennDOT also continually learns from its employees. Results from entrance, transfer and exit surveys reveal the reasons why employees choose to work for the agency, why they change jobs within the agency and why they voluntarily separate. It is worthwhile for workforce planners to consider this data for recruitment purposes and for targeting geographic areas, setting...
cohort/generational priorities and reaching out to underrepresented populations.

According to PennDOT’s retirement eligibility projections, more than 30 percent of agency employees could retire by 2023. Knowing this is valuable for identifying job classifications and organizational units that could become understaffed due to individuals’ voluntary, scheduled departures. It is also useful to consider the impact retirements have on younger workers. Since Gen X employees now outnumber baby boomers at PennDOT, agency leaders must focus on retaining and developing Xers, as well as on attracting more millennials and members of Gen Z.

Competition for the best and brightest talent in all age groups is fierce. Both the OA and individual agencies recognize this. At the enterprise level, the commonwealth introduced initiatives to begin meeting challenges to talent acquisition. Significant examples from 2018 include:

- Migration to position-based job postings for both CS and NCS positions. Taking this approach significantly increased the number of candidates for consideration, but it also created the need to convert the traditional civil service examination into more of a merit-based evaluation.
- Developing recruitment strategies and targeted advertisements based on online job applicants indicating how they found out about jobs.
- Offering hiring managers more flexibility in negotiating starting salaries for newly hired managers.
- Offering all employees new optional benefits in addition to existing paid health benefits, generous leave, variable work schedules, relative job stability and retirement benefits.

In December 2019, the OA announced a new recruitment model that would go into effect during January 2020. Recruiters and hiring managers across the state government will now focus their efforts on achieving agency hiring goals while leveraging shared resources and best practices. Agency recruitment staff will report to both their agency’s talent acquisition chief and to the OA Bureau of Enterprise Recruitment and Talent Planning.

More initiatives are on the horizon at the enterprise and agency levels to promote, attract and retain talented employees. HR operations in other jurisdictions face similar issues in managing their workforces, so HR professionals across the country can achieve success by sharing ideas, collaborating and building on each other’s unique vision for managing their talent resources and positioning government agencies as employers of choice.

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IPMA-HR Executive Director Search Open Until February 15

With longtime Executive Director Neil Reichenberg set to retire this spring, the Association is welcoming applications from public sector or nonprofit leaders. Visit on.ipma-hr.org/EDsearch for full details.

We invite members to share this announcement widely, though only applications from individuals with at least 10 years of experience leading in the areas of operations management, governance, external and internal relations, financial management and strategic planning will be considered.

The new executive director will be responsible for leading a staff of approximately 13 full- and part-time employees and contract professionals to deliver services relevant to members. Current services offered by the Association include delivering professional development opportunities, administering three professional certification programs, developing and updating job candidate assessment products, doing federal advocacy for public sector human resources, maintaining professional standards, sharing best practices, conducting conferences, fostering online communities, publishing a monthly magazine and several online publications, and managing member volunteer programs that include committees and taskforces.
Start With Purpose to Sustain Top Talent

By Eric Frazer, Psy.D.

When I ask people these days about their organization’s purpose and how that aligns with what matters to them, I’m often met with a long pause. Gentle encouragement to tell me which issues keep them up at night most times results in people telling me how there is a misalignment between their goals and the organization’s so-called purpose, mission-statement or real-world day-to-day routines.

Before resolving this dilemma, you have to accept a couple of truths about top talent and high performers. First, people change. Empowered by continuous learning, self-reflection and new goals, people transform. Second, organizations either support that development or they do not. The question to ask is how can an organization maintain, coach and mentor top talent to create an organization that is constantly replenishing existing talent with fresh talent to promote natural succession.

Obviously, no single answer exists. Rather, psychological research, survey data and longitudinal knowledge point to a set of best practices organizations should follow when updating their succession strategy and optimizing current practices for talent development and retention. These are necessary actions for organizations that want to thrive in the 21st century.

The 3Ps: Purpose, Personalization and Prioritizing Soft Skills

Embracing three principles will help organizations update or completely revise their strategies for talent retention and development. These 3Ps can be summarized as follows.

Purpose
Purpose needs to be conveyed through human interactions among the organization’s people, its customers and everyone in the product/service lifecycle. As example of organization that get this right, think (and read about) Patagonia and Zappos.

Personalization
Leadership development needs to be frictionless and available to everyone in the organization. I have often proposed creating a knowledge curator position and tasking that individual with regularly meeting with every employee to develop personalized continuous learning plans using multiple knowledge repositories. Each plan should come with a budget that accounts for time and learning, which are not free. A short list of knowledge repositories includes TED talks, professional conferences, podcasts and internally produced training videos featuring existing talent.

Prioritizing Soft-Skills
There is growing acceptance that psychological competencies are of value and necessary for developing in 21st-century organizations, but an accurate and research-informed vocabulary for talking about, teaching and implementing psychological competencies (a.k.a., soft skills, emotional intelligence, etc.) is needed. We are in a democratized climate in which just about anyone can call themselves a coach and teach mindfulness. Organizations can become distracted from developing talent by glomming onto buzzwords and not focusing on the credentials of consultants to serve as actual subject matter experts who base their practices on a foundation of science. The same goes for tests and software that claim to pinpoint top talent. Organizations must ask for the independently verified norms, validity and reliability of these tools.

Organizations can take action on implementing the 3Ps by creating a survey to tap into people’s beliefs and attitudes about the principles. The next step will be following up with a full-day
onsite or offsite retreat to update talent development and retention strategies.

Facilitate Skill and Competency Development Among Top Talent

Organizations must look closely at how they can cultivate both 21st-century digital skills in information processing, communication, collaboration and critical and creative thinking, as well as psychological competencies such as a growth mindset, grit, empathy, curiosity, compassion and emotional regulation.

The reality is that people and organizations fall all along a spectrum of these skills and competencies. It is the organization’s job to appraise where its talent is and to offer development opportunities that move people toward mastery. Doing this takes three steps.

- **Step 1.** Define the necessary 21st-century digital skills and psychological competencies. Ask if a mismatch between the existing skills and what are needed is contributing to why people voluntary leave the organization. Find answers by convening leaders, surveying the workforce and getting specific feedback from HR about reasons for voluntary exits.

- **Step 2.** After defining the skills and psychological competencies that reflect the organization’s core values, develop the resources and budget to consistently provide personalized professional development.

- **Step 3.** Incorporate the skills and competencies into hiring practices in a quantitative and standardized manner to effectuate a proven system for hiring top talent.

Coaching and mentoring existing talent are also necessary. In “The Leader as Coach,” which appeared in the November/December 2019 Harvard Business Review, Herminia Ibarra and Anne Scoular pointed out how managers providing supportive coaching to their team members promotes autonomy and personalized leadership development. Historically, however, coaching has been reserved for C-suite and upper-level leaders. This makes no sense because younger professionals who desire upward mobility will benefit the most from receiving feedback on their job performance in real time.

Millennials and Gen Z employees understand this, with survey after survey showing them demanding more coaching and mentoring. Organizations should view those survey results as a warning to get their professional development act together.

Mentoring is more personal than coaching. There are many creative ways to develop internal mentoring programs. One that I recently discussed at a conference focused on connecting people through common interests to make it easier for mentors to break the ice with protégés and get right to the point of discussing what is being done and how that can be done better. To ensure that mentoring persists, each meeting should end with the mentor asking their protégé some form of the question, “How can I continue to be helpful?”

Retention Makes a Resilient 21st-Century Organization

Developing existing top talent equates to keeping top talent. Both should be priorities because skilled and competent long-term employees will inspire and lead the next generation of workers. This sets the stage for fluid multigenerational transitions.

To achieve this reality, follow the three steps outlined above to align core values with existing resources and then focus on developing and recruiting for the digital skills and psychological competencies needed to foster organizational success. The best result will be people saying, “I love what I do,” which assures the organization has matched purpose with productivity. Giving talented employees a purpose-driven mission empowers those individuals in the present and, more importantly, shapes who they will become.

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Making Skilled Trades Safe and More Appealing to Younger Jobseekers

By Robin Fleming

I t is no secret that employers are struggling to fill skilled trades positions. According to annual surveys conducted by the Manpower Group, trade jobs have been the hardest positions to fill for most of the past decade. Obviously, high demand exists and many hurdles make attracting younger workers difficult. These include the push to obtain college degrees instead of pursuing careers straight out of high school and a clear preference for perks and benefits that skilled trades do not always offer.

Employers have realized that they need to differentiate themselves from competitors for skilled trades employees. One way to start doing this is to shift from asking potential hires, “What can you do for me now and later?” and toward asking, “What can we do for you?”

Employers have also started leveraging digital technology—which younger workers already expect with any job. Real-time access to information, instant communication and immediate feedback are all things that younger workers experience away from work. According to the Pew Research Center, more than 96 percent of Americans between the ages of 18 and 29 own smartphones that they use every day. These individuals also have advanced technology and tools in their homes and incorporated into their hobbies. As a generation known for being tech-savvy and relying on instant gratification, it comes as no surprise they will expect nothing less on the job.

Showcase Technology, Engagement and Development Opportunities

Here are five digital solutions that employers can utilize to stand out from competitors while recruiting younger workers.

Flexible Safety Solutions

Individuals place great emphasis on the health and safety of a workplace when deciding to take a job. It is not uncommon, then, for younger workers to be hesitant about pursuing jobs in skilled trades since, according to the CDC, workers ages 15-19 have two times the amount of work-related injuries as do workers who are 25 and older. The lack of experience and insufficient safety training are two main reasons for this.

Digital safety technology can help to reduce risks for injuries. Solutions are available to deliver safety processes, instant information and on-demand onsite training. Leveraging mobile technology at the point where work occurs can help workers identify and document safety risks and share information in real time. That information can then be analyzed and shared further to better inform all of the organization’s workers about how to avoid injuries.

Deploying risk-reduction solutions is also a great way to engage with younger workers who are used to using mobile devices. Supervisors and veteran employees can turn safety alerts into coachable moments and opportunities to create a more informed and more knowledgeable workforce all around.
Worker Engagement
With company culture having a major influence on jobseekers’ decision-making, employers will benefit from taking a top-down approach to providing the encouraging environment younger workers seek. It is particularly important to recognize that the traditional audit and correction method to finding and resolving quality and safety issues can foster a negative workplace environment. Workers may hesitate to ask questions or raise concerns if they believe that doing so will get them in trouble. And the resulting silence could lead workers to thinking they are doing something correctly when they should be calling for changes to processes, policies and procedures.

Workers who receive recognition and rewards for identifying, documenting and mitigating quality or safety issues will have a very different view from those who are not acknowledged for their proactive efforts. The lack of an acknowledgment sends a clear message that efforts are not appreciated. Conversely, granting accolades for safety and quality and recognizing worker-led innovation can attract potential employees.

Workers who feel comfortable taking the right safety measures and receiving feedback will also feel a greater appreciation for their employer and feel as if they are contributing to continually improving quality and safety. Quality and safety solutions can be optimized to engage and support workers in real-time, as well as to foster good relationships among workers, supervisors and management. As the federal Occupational Safety and Health Administration stresses in its recommendations for safety and health programs, encouraging worker inclusion and participation in such programs gives employees chances to share their own thoughts and concerns. This positive reinforcement and motivation drives engagement and pride in their work, which leads to a positive culture and promotes safety across the organization.

Productivity Programs
A survey by CompTIA found that 67 percent of millennials consider what technology is offered when looking into potential jobs. At a minimum, younger workers expect digital productivity tools to be in place instead of paper forms or informal processes. Employers who offer bring your own device options or who mandate the use of company-issued devices can both leverage and benefit from using a wide variety of solutions for work and task management, collaboration and communication—all aimed at improving productivity and minimizing manual work that adds no value.

Communication Technology
Ensuring consistent and reliable real-time communication across all levels of an organization can help reduce rework, improve quality and boost efficiency, reliability and safety. Communication on the job is essential, but every employer does not provide workers with the tools they need to instantly connect and engage in real-time collaboration. Commercial chat and video apps have set high expectations for communications, and employers must meet those expectations to attract young workers.

Employers must do more than make it easy for employees to call and text, though. Workers, supervisors and management must all be able to communicate and collaborate directly. Ensuring the ability to share and make decisions about information without delay is especially important and helpful when a workforce is dispersed, as is often the case for skilled tradespeople who work out in the field and cannot simply walk down the hall to ask their manager a pressing question.

Job Education and Training
All of the components of a successful work environment can be in place and only the best new employees can be hired, but an organization will not realize its desired results if engaging and productive training is not offered. Those new hires will grow frustrated with the lack of information on the job and either become disengaged and unproductive or leave.

To produce valuable learning, job-related educational material must be relevant, easy to access and available on demand. According to TechSmith, more than 64 percent of millennials understand visual information faster. The lesson from this is that the most-effective training sessions will make use of photos, videos and simulations. Reading from the manual and administering a paper test simply will not suffice for a workforce that is used to watching how-to videos on YouTube and gathering information via Google searches.

Don’t Neglect Perks
As with office and executive positions, offering innovative perks can attract high-quality skilled tradespeople. A generous benefits package grabs applicants’ attention and sends the message that this is somewhere that recognizes their importance and acknowledges them accordingly.

Younger workers want to be proud of where they work. Employers who invest in engendering that pride by providing the proper tools and environment are ahead of their competition in the search for talent.

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For nearly a dozen years, through 2008, we evaluated all 50 state governments on a wide variety of management issues, looking in particular at workforce planning. We occasionally did the same for cities and counties. The news in those days, unsurprisingly, was not happy.

Twenty-some years ago, the outlook for workforce plans was short. Even the cities we praised typically used a one- or two-year horizon and did not use processes geared to projecting long-term evolving workforce needs. Some large cities depended heavily on paper-based hiring practices. Multiple others described technology that was “user-hostile,” with data reports produced slowly and, in some cities, only accessible by IT staff. One city’s officials told us they could not even identify the average age of the workforce or produce data on voluntary or involuntary turnover.

Data Quality Concerns

Sadly, though there has been dramatic improvement over the years, data challenges are still prevalent in workforce planning. We continue to hear complaints about clumsy and ineffective technology.

“Gathering workforce data is currently a struggle given our legacy systems which do not communicate easily—or at all—with one another,” a state HR director told us recently. A new human resource management system is coming to her state this year, but agencies currently struggle to match position information with budget information. Even knowing the location where individual employees work is chancy. A major cause of problems is the requirement for manually inputting data. Inconsistent data entry by some agencies also needs to be addressed.

Another common obstacle to doing solid workforce planning across entire organizations is the decentralized nature of many government workforces. A mêlée of government departments and functions results in making data analysis and workforce planning responsibilities for individual departments. HR directors and others deeply involved in the world of government personnel tell us that while they may create policies and communicate best practices to agencies, the enthusiasm and success of agency efforts vary wildly, as does the data they are inputting.

Rebecca Kopcienski is director of the Personnel Review Commission in Cuyahoga County, Ohio. Her commission handles classification and compensation for the county’s non-bargaining employees and is also responsible for compliance auditing and civil service testing. Using data to inform and build workforce plans has enormous potential, she said, while also sharing her worries about data integrity issues.

“One of our challenges is making sure that the people who are actually entering data into these systems receive adequate training,” Kopcienski said. “Sometimes they don’t have an appreciation of the errors they make when they enter the data.”

Putting Data to Work

The data frustrations experienced by many organizations have to be counterweighted with positive developments. In Memphis, a move to the cloud has facilitated new ways of accessing and working with the city’s workforce data, said HR officer Alex Smith. Workforce planning is relatively new to the city, with little done before Smith moved from her previous jobs in the private sector and took the top HR position in 2016.

According to Smith, “Moving to the cloud caused us to reevaluate and look at our HR processes as we have new capability in terms of analytics, and we can have a more concerted conversation about recruitment and attrition. Having access to reports and data in a succinct way has given us the ability to be more proactive.”

Of course, workforce planning needs to be an ongoing activity if it is to be effective. A single document has every chance of falling out of date as the seasons change. Memphis Mayor Jim Strickland’s focus on data-based decisions and his creation of an Office of Performance Management in January 2016 helped Smith and other city leaders develop and consider key
workforce performance indicators and data on a monthly basis.

Bulking up the analytical abilities of staff has also been a key priority in Memphis. In 2017, Smith built an HR solutions and analytics team, drawing more private sector individuals like herself into government and expanding training opportunities for her staff. Smith also created new roles to advance this effort. For example, she named Eric Sabatini, who had worked for the city for more than 20 years, HR analytics and performance senior manager to ensure someone was focused on driving people analytics and HR technology solutions for the HR department.

Data analysis has already influenced the adoption of a retention bonus plan for police. With police recruitment being a nationwide challenge, the HR solutions and analytics team analyzed the points at which resignations not related to retirement are most likely. The team found that officers with between 3 years and 11 years of tenure have been most likely to depart. The city now provides retention bonuses of $6,400 to $7,000 paid out over four years to officers who fit the profile. Qualifying for a bonus requires committing to staying on the job for an additional four years. In 2019, the retention rate for the more than 620 officers receiving bonuses was 97.5 percent.

Smith acknowledged that the use of predictive analytics to direct workforce planning is still at an early stage and that the big benefits will accelerate as people in her department become increasingly comfortable with the data at their fingertips. “We’re new to the cloud, and having a workforce planning process is a new phenomenon,” she said.

Preparation for a Future Workforce

Producing concrete assessments of future workforce needs is an evolving process. While governments may be awash in demographic and process data, the numbers do not themselves provide the answers needed to meet changing needs for personnel and skills.

“We look at process data because it’s easier to count,” said Gerald Young, senior research associate with the Center for State and Local Government Excellence (SLGE). “Intangibles are not that easy to count, and they aren’t as easy to collect as overtime information, sick leave or hiring.”

Young cited the growing but still-infrequent use of stay interviews as a way to determine the reasons why employees are motivated to continue working for a state or locality. Learning this information can help cities, counties and states adjust policies and practices to influence employee decisions about remaining in their jobs. Still, a 2019 SLGE survey showed just 8 percent of local and state governments were using stay interviews while 69 percent were using exit interviews.

Workforce planning needs to be an ongoing activity if it is to be effective.

Governments that conduct periodic employee engagement surveys can also tap into that data while creating and updating workforce action plans. For example, the City and County of Denver has been tracking employee engagement every two years since 2011. Over the years, the creation of the survey, its marketing and the use of the data to inform plans has changed dramatically, according to Karen Niparko, executive director of the Office of Human Resources. Survey results now arrive far more rapidly than in the past, and Niparko’s office works with agencies on data analysis and follow-up on workforce action plans that are developed based on engagement survey results.

What’s Next?

As we talked with HR directors for this column, we asked whether they had a wish list of data that would help improve workforce planning. Several brought up inventories of employee skills—even those that might not be immediately applicable to current jobs—to be matched with updated job specifications.

Byron Decoteau Jr., the state civil service director in Louisiana and president of the National Association of State Personnel Executives, also brought up work that his state is doing on mapping out crucial employee competencies. About five years ago, civil service staff pinpointed 40 competencies such as creative thinking, social awareness and change leadership that lead to employee and supervisor success.

Louisiana has run several pilot projects since then to determine the competencies that are best matched with different jobs. In one, employees who had been evaluated as exceptional performers were asked to prioritize the competencies that are most important for their job. The employees’ supervisors independently tackled the same task.

This and other projects to match competencies with job performance are helping Louisiana develop data that can eventually be put to use for workforce planning. But there still is a distance to travel to get to that point. The effort will eventually depend on agency interest and engagement.

“We don’t have a system now where we can track that information, but that would be on my wish list,” Decoteau said. “That kind of system could map the changing nature of work and match that to the competencies and skills that are available and those that may be lacking.”

Katherine Barrett and Richard Greene have analyzed and written about state and local management and policy for nearly 30 years. You can find more of their reporting and commentary online at www.greenebarrett.com and follow them @greenebarrett. Their email address is greenebarrett@gmail.com. —

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“America’s Premier Community.”

This is the vision of the City of Henderson, Nev. With a population of 314,000, Henderson is the state’s largest full-service city and one of the nation’s fastest-growing communities, and city government is working hard, and successfully, to achieve its lofty vision.

In 2019, Henderson received both an IPMA-HR Agency Award for Excellence and a Southwest Alliance for Excellence Pioneer Award for Excellence. The award from the Southwest Alliance, which is modeled after the Malcolm Baldrige National Quality Award, recognizes effective and systematic approaches that align with organizational needs.

Henderson’s focus on measuring and improving the engagement of its nearly 3,000 employees was front and center in the city’s successful award nominations.

Since 2013, Henderson has conducted annual employee engagement surveys to measure the level of engagement of its workforce and identify the key drivers of engagement. This strategy is an important component of the city’s broader strategy to assess how city government impacts Henderson’s residents.

The city measures engagement through a partnership with my organization, the Institute for Public Sector Employee Engagement. For the past two years, we’ve administered and reported on the results of Henderson’s annual employee engagement survey.

Since 2013, when Henderson began conducting annual employee engagement surveys, the percentage of employees who are engaged has steadily increased. In 2019, 90 percent of city employees were engaged, achieving the city’s goal. Moreover, 95 percent of the city’s volunteers were engaged.

This is world-class engagement, exceeding public- and private-sector benchmarks. For comparison, the Institute’s annual national survey of employee engagement in the U.S. workforce revealed that 82 percent of private-sector employees are engaged and 76 percent of government employees (federal, state and local combined) are engaged.

Moreover, 51 percent of Henderson’s employees are “fully engaged,” compared to just 40 percent in the private sector and only 35 percent in government.

Henderson has achieved world-class engagement by making engagement a citywide priority, measuring engagement and then systematically acting to improve it.

The city’s strategic plan calls for creating a “High Performing Public Service,” which is “not possible without an engaged workforce.” In other words, employee engagement is not a “program” or merely the province of HR. Instead, it is a core Henderson competency and strategic priority that is critical to delivering high-quality services to the city’s residents.

Henderson’s focus and actions illustrate the Institute’s five-step employee engagement roadmap, as shown below.

Plan and Set Goals

Henderson’s planning and goal setting focused on developing and tailoring the Institute’s standard survey to meet the city’s needs, reaching all employees, driving a solid response rate, achieving a high level of engagement and preparing to take action on the survey results. For example,

- Henderson decided to conduct two surveys—one for employees and one for volunteers—to allow all city contributors to express their views. This meant tailoring the survey to two separate groups (e.g., not asking volunteers about pay and benefits).

- The survey is conducted online, but many city employees do not have or use city email accounts, primarily because employees in departments like public works and parks are out and about in the city doing their jobs. To reach these employees, our Institute worked with Henderson to develop personalized hard-copy survey invitations that included a link to the survey and an individual password. The city distributes the invitations and arranges for employees to complete the survey online.

- Henderson mounted an aggressive multimedia communication campaign to ensure employees knew that completing the survey was important, the city would act on the results and employees’ responses would be kept confidential. One communication was a recorded interview with the city manager about the survey that was posted on the city’s website.

- Consistent with best practices, Henderson’s action planning focuses on individual departments. Taking this approach drives action down to the city’s front lines.
and builds in department-level accountability.

**Survey Employees**

Henderson’s 2018 and 2019 surveys were conducted over three-week periods. The Institute sent personalized email invitations to employees with city email accounts and supplemented this outreach by sending personalized paper invitations to the employees without city email accounts. We also sent two response rate updates to the city during the survey periods, and three reminder notices to employees who hadn’t yet completed a survey, including a “last-chance” notice the day before the survey closed.

**Analyze and Share Results**

The Institute provided Henderson with a series of reports on the survey results. These included:

- A citywide summary with engagement scores (i.e., percent of employees who are fully engaged, somewhat engaged and not engaged);
- Question-by-question results for the city overall and for 14 city departments;
- Benchmarks from the Institute’s national survey for engagement levels and for each survey question;
- Survey questions with the largest impact on the engagement score citywide and for large departments (i.e., the key drivers of engagement); and
- Recommendations for action on each of these key driver questions.

Consistent with the city’s commitment to transparency, Henderson distributed the citywide results to all employees and volunteers.

**Take Action**

Surveying employees is important, but it is only the start. The real payoff is taking action to improve engagement. Henderson’s action strategy focuses on city departments. For example, HR and the Henderson Office of Performance Improvement facilitated action planning sessions with individual departments. Those sessions focused on department-level results and explored ways (and barriers) to maintain and improve engagement.

The city manager and HR also put in place citywide programs designed to respond to survey results. These include:

- Individual and group executive coaching and development for new leaders to hone their business expertise, relationship building and strategic orientation.
- Henderson High Fives, a rewards and recognition program that allows employees to recognize peers, supervisors and subordinates. Employees are awarded points they can redeem for logo gear, gift cards and Amazon merchandise. Employees submitted 11,000 recognitions in the program’s first nine months.
- Culture Champions Program in which representatives from each department and major divisions act as ambassadors to support and implement workplace culture and engagement-related activities.
- All-hands meetings that center on the city’s vision, mission, values and strategic orientation.
- A revamped new employee orientation that not only communicates important information, but reinforces the city’s culture and how individual employee roles are tied to the city’s vision, mission, values and priorities.
- The Harvesting High Fives Festival during which employees and their families celebrate colleagues who are living the city’s values.
- Employee appreciation events such as Let’s Give ‘em Somethin’ to Taco ‘Bout and Celebrate, as well as a tailgate, both of which are scheduled during Public Service Recognition Week in May to thank city employees for their contributions.
- A Teamster shadowing program that allows represented employees to shadow incumbents of positions they are interested in. This helps employees make more informed decisions about careers paths and also enables the city to gauge interest in various positions.
- A certification reimbursement program that reimburses employees who pay to obtain a certification related to any job, regardless of the employee’s current job.

**Evaluate Actions and Sustain Engagement**

Henderson has made a long-term commitment to measuring engagement and then using the results to create the environment and conditions needed to maintain a high level of engagement. This commitment involves annually surveying employees and volunteers, conducting citywide and department-level action planning, and monitoring how plans are executed.

This continual cycle has achieved results. For example, 81 percent of survey respondents in 2019 agreed with the statement, “I believe that my department’s senior leaders will take action on the results from this survey.” This illustrates that city employees know that their survey responses will lead to action.

Henderson has made engagement a key strategic priority. The result is a world-class level of employee engagement and a workforce committed to directly supporting the city’s vision to be America’s Premier Community.

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Hip hip hooray! It is 2020, and change is in the air.

Upgrading to the next smartphone seems exciting. Contemplating organizational change? Ugh.

Still, organizations must regularly renew themselves lest they stagnate and become less effective.

The basic business model for change—plan, implement and measure—is well-known to nearly all workers, but successfully carrying out organizational change requires more than formulating plans, setting schedules and crunching numbers. Ensuring that people understand the reasons for change and commit to the process is equally important.

Research showing that almost two-thirds of change management projects fail due to ineffective communication confirms the reality that how well organizations use communications to enlist employees in the change process makes as much difference as putting together a workable plan. Indeed, following a good communications strategy often determines whether a change management initiative succeeds or fails, and whether the organization survives and grows.

The past two decades of change management experience have also taught organizations the valuable lesson that carrying out a major change is impossible without the support of line managers and the involvement and help of employees at all levels. Recognizing this leads directly to asking the question, “How can a supervisor or manager help guide their team through the change process?”

The answer boils down to communicating responsibly while also fully acknowledging that the sources of communication employees tend to trust most are their immediate managers and supervisors.

Here are six things that must be done to communicate clearly, consistently and completely through the change process.

**Set the Stage by Communicating, Communicating and Communicating**

Managers, supervisors and executives must provide a complete picture of what the change is, why it is being made and why the change must happen now. They should consider it a priority to ensure all employees know the who, what, where, when, how and why of the change initiative.

Most important here is encouraging and answering specific questions. When employees do not understand and sign off on the rationale for change, they will feel that the change is happening to them rather than with them. This will make them uncomfortable, lacking in autonomy and prone to resentment.

It is also essential to communicate the vision for change. Sharing the vision sets the direction and provides a guide for understanding what the change is and when it has taken hold. The key is articulating the vision in language that is clear enough to motivate action. Change expert John Kotter noted that a good vision statement “conveys a picture of what the future will look like” once change occurs.

Citing the vision statement while building the case for change helps, as does presenting facts about realities like external forces driving the need to change what the organization and a particular work unit do. Taking this approach helps employees connect the dots between forces that demand change and the actions being taken.

The final goal of communicating about organizational change is to create a
sense of urgency among employees that change is not only important, but it must be done quickly and efficiently so the organization can remain viable. Explaining why the old ways are no longer working helps deliver this message.

Communicate Face to Face
While not always possible, communicating change initiatives face to face is important. Change can have a big impact on organization structure and the way work gets performed. This makes information about the change personal.

Carve out time during work unit team meetings to make announcements, check for understanding and clarify information as needed. To ensure that this is effective, managers and supervisors must commit to gathering and thoroughly studying the information they share.

Recognize That Making a Change Triggers Emotions
Experiencing change is tough because it requires letting go of old habits and transitioning to new ways of thinking and doing things. It is no surprise, then, that change in the workplace often triggers emotional reactions, ranging from denial and resistance to tentative acceptance and commitment.

Managers and supervisors can exert a tremendously settling influence and reduce anxiety, negative feelings and loss of focus. They can do so by reaching out and showing empathy, listening intently and encouraging dialog. This will enhance the likelihood that the change is embraced and takes hold.

Deal With Change Realistically While It Is Happening
In the age of tweets, Slack and Microsoft Teams, updates on any reorganization will arrive at the speed of a text. This makes being as candid and open as possible imperative for managers, supervisors and executives.

Indulging an instinct to share only positive news and views will accomplish little beyond increasing anxiety, engendering distrust and having employees fill in information gaps by MSU’ing (i.e., making $#!& up).

People want to know where things stand at any given point in time. Communicate promptly and do not let the rumor mill churn. When facts are lacking and answers do not exist, admit this, pledge to share information when it becomes available and keep that promise.

Involve People
Change needs to be understood and managed in ways that help people cope with it. The task for managers and supervisors who want to minimize resistance is to acknowledge employees’ needs to take some control.

Everyone feels a loss of autonomy and fear when change is imposed on them. Empowering employees to participate in effecting change, however, instills feelings of being in control and having ownership of outcomes.

Participating by becoming involved in planning and implementation fosters commitment and helps employees focus on what will be instead of fixating on what was. Even just meeting regularly with team members to discuss how change will impact their work and to brainstorm solutions to problems will give employees a sense of control and ownership.

Build Momentum for Change
Even as it creates stress, change often seems like a distant, abstract concept to employees who find themselves asking, “How does this affect me and the work I do?” Managers, supervisors and executives must have answers.

One essential steps to take is identifying work opportunities where employees can put new methods into practice, gain familiarity with the new methods and achieve quick wins. When employees see the benefits of making the change for themselves and the work unit, personal commitment increases. Facilitating quick wins is especially effective for winning over fence-sitters.

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Recommendations for Further Reading

- Changemaking: Tactics and Resources for Managing Organizational Change by Richard Bevan, which covers the importance of communicating relentlessly, listening and leading with clarity and involvement.
- Managing Transitions: Making the Most of Change by William Bridges, which is aimed at managers and provides practical tips for avoiding or minimizing workplace disruptions resulting from change.
- “Address the Real Reasons Employees Resist Change,” which is the June 2019 Leadership Roadmap column in the June 2019 HR News.
Lawsuit Claims Employer Forced Gay Employee to Hide Sexuality

A fired server/manager for a Michigan microbrewery has sued the company, alleging that his manager told him he would only get promoted if he hid his sexuality and that he lost his job after complaining to the owner. Boshaw v. Midland Brewing Co. (No. 1:2019cv13656) was filed with the U.S. District Court for the Eastern District of Michigan on Dec. 12, 2019.

Ryan Boshaw is an openly gay man in a long-term relationship with a man he publicly identifies as his partner. Boshaw started working at the Midland Brewing Company in May 2018 and quickly earned a promotion to hourly manager. Boshaw’s direct supervisor was Donna Reynolds, the general manager.

In November 2018, Reynolds told Boshaw that Midland’s owner, David Kepler, was considering promoting him to a salaried position as front of house manager. Reynolds also allegedly told Boshaw she was not sure how Kepler would view Boshaw’s same-sex relationship. One reason she and the other employees at Midland knew Boshaw was dating another man is because he mentioned it on his Facebook page.

Reynolds suggested that Boshaw would be more likely to receive the promotion to the salaried position if he worked to appear “more masculine” by hiding his relationship status on Facebook, removing his visible piercings and styling his hair differently. Boshaw replied that the cumulative effect of taking those steps would be hiding his status as a homosexual. Nevertheless, he did eventually remove all references to his sexuality and his partner from his Facebook page, and he avoided referring to his status as a gay man in public.

After taking those actions, Boshaw was promoted to front of house manager. Soon, Boshaw began experiencing issues in his relationship that he traced to the changes in his appearance and public behavior. On Feb. 14, 2019, he spoke with Midland’s owner about his conversation with Reynolds, explaining to Kepler that he felt discriminated against because of his sexuality. Kepler told Boshaw he would speak to Reynolds about this.

After hearing from Kepler, Reynolds told Boshaw that she was offended and, according to Boshaw, began “hyper-scrutinizing” his work. Reynolds then recommended on May 27, 2019, that Kepler fire Boshaw, and Kepler approved the termination. The reasons given to Reynolds were his absence from a meeting and other unspecified “misconduct.”

In his lawsuit, Boshaw says that changing his appearance and hiding his relationship created issues in his work and personal life, and that he would have never chosen to make the changes if Reynolds had not suggested that doing so were conditions for being promoted. He is suing for illegal discrimination and retaliation, alleging that Midland terminated him based on his sexual orientation and in retaliation for his complaint to Kepler. He further alleges that Kepler and Reynolds conspired against him to terminate him after he complained about sex-based harassment.

The plaintiff claims to have suffered religious discrimination, a hostile work environment and retaliation from a human resources manager and several coworkers after he repeatedly raised concerns about what he believed to be improper scheduling practices and wage theft.

The plaintiff is Gebrial Rasmy, a Coptic Christian who was born in Egypt and who had worked as a banquet server at the Essex House from 1992 until being terminated in 2016. Marriott took over management of the hotel near Central Park in New York City in 2012.

That year, Rasmy told Essex House HR Director Karen Doherty that he believed other employees were engaging in wage theft. According to Rasmy, his complaints were shared throughout the workplace and other employees retaliated by circulating petitions against him and by calling him racist names and ethnic slurs such as “Egyptian rat.”

In 2013, Rasmy reported the alleged wage theft and name-calling to Marriott’s business integrity hotline and several supervisors. He claims the company took no action.

Rasmy made subsequent complaints until, he claims, Doherty told him to keep his mouth shut. Frustrated, Rasmy drove to Marriott’s corporate headquarters in Maryland and spoke with the senior director of global investigations, informing that company official of the suspected wage theft and discrimination. Again, Rasmy says, nothing was done to remedy the situation.

Tensions between Rasmy and his coworkers escalated until, in May 2016, he got into a physical altercation with a fellow banquet server while working an event. On Doherty’s recommendation Marriott then terminated Rasmy and the server with whom he had fought.

Rasmy filed a lawsuit alleging discrimination and a hostile work environment based on his religion, national origin and race. He also alleged retaliation for reporting possible wage theft.

Former Employee Alleges Retaliation for Reporting Suspected Wage Theft

The U.S. Court of Appeals for the Second Circuit on Dec. 11, 2019, heard oral arguments in Rasmy v. Marriott International, Inc. (No. 18-03260).
The district court dismissed each of his claims for several reasons. First, the fact that Rasmy’s coworker was also terminated following the altercation negated any evidence of discriminatory intent or disparate treatment relating to Rasmy’s termination.

Second, Rasmy could not connect his termination to his coworkers’ alleged racist name-calling. Third, Rasmy could not establish his retaliation claim because Marriott was able to state a legitimate reason for Rasmy’s termination—specifically, his physical altercation with his coworker.

Last, the district court noted, Rasmy could not establish a hostile work environment because the alleged racist name-calling was not severe or pervasive. The incidents, even if provable, appeared to be stray remarks that did not alter Rasmy’s working conditions.

On appeal Rasmy, argued that the district court erroneously found that his coworkers were motivated by personal animus rather than discriminatory animus when responding to Rasmy’s allegations of wage theft. In addition, Rasmy claimed that the company did not fully review video footage of the physical altercation that led to his termination. He claimed the video shows him doing nothing wrong. Last, Rasmy argued that the district court did not review or consider the entire 3-year course of the abuse he endured.

Marriott counterargued that Rasmy only complained of discrimination after one of the employees reported Rasmy had physically threatened him. In addition, Marriott claimed that Rasmy’s repeated wage theft allegations were meritless, as the company was operating pursuant to a collective bargaining agreement with new scheduling practices. The rules permitted the scheduling practices that Rasmy called wage theft.

Timing, Reason for Termination Defeat Former Employee’s Claims of Disability, Genetic and Age Discrimination

The U.S. District Court for the District of Arizona on Dec. 6, 2019, dismissed all discrimination and Family and Medical Leave Act (FMLA) interference claims brought by a systems administrator against his former employer. No one disputes that the plaintiff in Mpoyo v. FIS Management Services, LLC (No. 2:17-cv-04307) was chosen for a reduction in force at the same time that he was undergoing screening for prostate cancer, but the court determined that no facts support his assertions of discriminatory intent or improper FMLA practices.

The defendant company, FIS, hired Kolela Mpoyo in 2013 and terminated his employment in April 2016, when he was 51 years old. The sequence of events giving rise to the employment lawsuit commenced in late 2015, when FIS asked its employees to participate in a health assessment program that included biometric screenings for height, body mass index, blood pressure, blood glucose and cholesterol levels. A third-party vendor performed the screenings, and Mpoyo’s results showed him to be at high risk for prostate cancer. The screening company notified Mpoyo of this and recommended that he undergo additional testing.

In order to do so, Mpoyo requested time off work in March 2016, telling FIS only that he was “sick.” The additional testing did reveal cancerous growths, and Mpoyo received his diagnosis on April 27.

That news arrived 23 days after FIS informed Mpoyo that he was being let go. The company began planning in January 2016 to reduce operating costs by terminating its lowest-performing employees, and it reached decisions about which people to fire in March. The choices regarding who to let go were based on analyses of past performance reviews for all employees in Mpoyo’s department.

One other employee was fired in addition to Mpoyo. That individual was informed while Mpoyo was taking leave. The company called Mpoyo on April 4 to break the news.

In his lawsuit, Mpoyo alleged that FIS terminated him in violation of his rights under the Americans with Disabilities Act, the Genetic Information Nondiscrimination Act (GINA) and the Age Discrimination in Employment Act. He also claimed that the company interfered with his rights under the FMLA. The court issued summary judgments in favor of FIS on all claims.

First, the court dismissed Mpoyo’s disability discrimination claim because FIS did not know that Mpoyo had cancer at the time that it terminated his employment. All facts showed that Mpoyo did not tell anyone he had cancer, his health screening results were never sent to FIS and the individual who made the decision to terminate Mpoyo did not know of Mpoyo’s diagnosis at that time.

Second, the court dismissed Mpoyo’s GINA claim because FIS received only aggregate data on employees’ health screenings and was never aware of Mpoyo’s genetic predisposition to developing cancer. Third, the court dismissed Mpoyo’s age discrimination claim because FIS did not know that Mpoyo had cancer, his health screening results were never sent to FIS and the individual who made the decision to terminate Mpoyo did not know of Mpoyo’s diagnosis at that time.

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Last, the court dismissed Mpoyo’s FMLA-related reason.
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Reassignment to Diversity Position Gives Nurse Manager Grounds to Proceed With Discrimination Claims

A longtime employee at the University of Utah hospital is being allowed to continue pursuing race and national origin discrimination claims under Title VII of the Civil Rights Act of 1964. The U.S. District Court for the District of Utah did, however, dismiss a retaliation claim related to the plaintiff’s reassignment to a newly created director of diversity position at a community clinic run by the hospital. The split ruling on the defendant’s request for summary judgment in Adjei-Poku v. University of Utah was issued on Dec. 6, 2019.

The university hospital hired Gladys Adjei-Poku as a clinical nurse in 1995 and promoted the Ghanaian immigrant several times until she reached the position of associate director of cardiovascular medicine, AirMed and endoscopy services in 2012.

In 2013, at her then-supervisor’s request, Adjei-Poku began assisting at the Midvale Clinic. The clinic is staffed by volunteers and serves primarily low-income patients. Adjei-Poku performed clinic duties along with her other assignments.

Also in 2013, a restructuring of the hospital’s nursing department placed Adjei-Poku under the supervision of Tracey Nixon. Despite praising Adjei-Poku’s performance in some areas, Nixon also stated that she believed Adjei-Poku was having difficulty transitioning from the role of nurse manager to associate director. In particular, Nixon pointed to perceived struggles with working in teams and with managing the political relationships involved in fulfilling the duties of an associate director.

In December 2015, Nixon decided that Adjei-Poku should no longer be an associate director of cardiovascular medicine and reassigned her to a position helping to manage a smaller unit. In accepting that more-limited assignment, Adjei-Poku would retain her job title and continue working at the Midvale Clinic and supporting the Office of Diversity.

Adjei-Poku still saw the change as a demotion and went to the university’s Office of Equal Opportunity and Affirmative Action to determine whether she had grounds to file an official complaint that the university was discriminating against her. An investigator told Adjei-Poku that she could not successfully raise a discrimination complaint without having legally sustainable proof, and she decided against doing so at that time.

When Nixon further decreased Adjei-Poku’s responsibilities in early January 2016, Adjei-Poku delivered a written statement to Nixon, which the court summarized as raising concerns about “racial stereotyping, her diminishing work responsibilities, losing her job, and her diversity role.” She also met with the hospital’s chief nursing officer, Margaret Pearce, to voice her concerns about Nixon.

Pearce informed Adjei-Poku that keeping her current position required learning to work with Nixon. As an alternative, and given Adjei-Poku’s dissatisfaction with the situation, Pearce suggested taking on the role of “Director of Diversity.”

Adjei-Poku agreed but soon came to feel that the reassignment to the diversity position was discriminatory. She complained to several university offices and the Utah Attorney General’s office, and she began actively looking for a new job. When she accepted a different position, the diversity director position ceased to exist.

Adjei-Poku filed her lawsuit in October 2017, alleging that Nixon discriminated against her and that the university retaliated against her for complaining about Nixon’s actions. She further alleged that university staff humiliated her in staff meetings by saying people could not understand her accent, mocked her accent and moved her to a nonexistent position in diversity in which she had no experience. Last, she alleged that the university removed her from her nursing duties despite her good performance and replaced her with a white woman who had less experience.

The court held that Adjei-Poku could proceed on her discrimination claims, citing evidence that she was the only person transferred outside of the nursing department, the only employee transferred to a significantly different position and, as the only black member of the nursing management team, placed in a diversity position. The court also held that Adjei-Poku could not proceed on her retaliation claim because there was no connection between her complaints and her reassignment. Evidence showed that the university was already making plans to reassign her prior to her complaint.
Member News

Teri Casey is serving as acting director of human resources for the City of Kansas City, Mo. She had been a senior HR manager with the city.

Congratulations to Angelita Jackson, IPMA-SCP, on her recent retirement as human resources director for the City of Shreveport, La.

Brody Lorda, IPMA-SCP, was promoted to assistant director of human resources for Yolo County, Calif. Lorda also currently serves as president of the IPMA-HR Sacramento-Mother Lode Chapter.

Priscilla Wilson, IPMA-SCP, accepted the position of chief people officer for the International City/County Management Association (ICMA).

The California Public Employers Labor Relations Association (CalPELRA) gave the following awards during its 2019 Annual Training Conference:

- Moving Forward Award to Micki Callahan, IPMA-SCP, human resources director for the City & County of San Francisco
- Madge Blakey Award of Excellence to Debora Boutte, IPMA-SCP, personnel officer for Contra Costa County

IPMA-HR Welcomes Its New Members

The Association looks forward to serving and connecting these organizations and individuals who joined during December 2019.

New Agency Members

City of Hawthorne
Hawthorne, Calif.

Coral Springs Police Department
Coral Springs, Fla.

County of Halifax
Halifax, N.C.

King William County Public Schools
King William, Va.

Mississippi State Personnel Board
Jackson, Miss.

New Individual Members

Katherine Barrett
New York, N.Y.

Olivia Brown-Bacon
Lake Worth Beach, Fla.

Carla S. Bryant
West Palm Beach, Fla.

Rebecca Green
Auburn, Ala.

Grow With IPMA-HR

Visit www.ipma-hr.org/events to make sure you don’t miss out on a course or meeting that is tailor made to help you learn and progress in your role as a public sector human resources professional.

Upcoming Association courses for 2020 include online offerings of

- Developing Competencies for HR Success–Session 1, starting on February 10;
- Public Sector HR Essentials–Session 2, starting April 6; and
- Workforce and Succession Planning–Session 1, starting 14.

We will also make our in-person Ethical Leadership Program widely available for the first time this spring.

In addition to courses, IPMA-HR plans a full slate of webinars, meetings and regional and chapter conferences, which will all lead up to the 2020 Annual Conference that is scheduled for Sept. 13-16 in Baltimore.
Certification Corner

Congratulations to these newly certified individuals!

- Anne Aban, IPMA-SCP
  Assistant Personnel Director
  City of San Diego
  San Diego, Calif.

- Richard Austin, IPMA-SCP
  Senior Labor Relations Representative
  City of Los Angeles Department of Water and Power
  Los Angeles, Calif.

- Anisa Ayer, IPMA-CP
  Human Resources Analyst
  Pinal County Human Resources
  Florence, Ariz.

- Joanna Baez, IPMA-CP
  Human Resources Assistant
  City of Chino Hills
  Chino Hills, Calif.

- Nichole Biechler, IPMA-SCP
  Human Resources Director
  Wasco County Human Resource The Dalles, Ore.

- Jason Boling, IPMA-CP
  Human Resource Administrator
  Department for Public Health
  Frankfort, Ky.

- Nora Carles, IPMA-SCP
  Assistant Director of Human Resources
  City of Tamarac
  Tamarac, Fla.

- Tina Collins, IPMA-SCP
  Personnel Administrator
  City of New London
  New London, Conn.

- Angel Geoghan, IPMA-SCP
  Standards & Compliance Specialist
  Hamilton County 911 Emergency Communications District
  Chattanooga, Tenn.

- Ellene Horne, IPMA-CP
  Human Resources Manager
  City of Idaho Falls
  Idaho Falls, Idaho

- Ernie Johnson, IPMA-CP
  HR Technician
  Mohave County HR Online
  Kingman, Ariz.

- Lin Lin, IPMA-SCP
  Senior Personnel Analyst II
  Los Angeles City Employees’ Retirement System
  Los Angeles, Calif.

- Joey Lopez, IPMA-SCP
  HR Generalist
  City of Baytown
  Baytown, Texas

- Yoko Matsumoto, IPMA-CP
  Director of Human Resources & Civil Service
  City of Arlington
  Arlington, Texas

- Shwani McAtee, IPMA-CP
  Senior HR Specialist
  City of Prescott
  Prescott, Ariz.

- Heather McCord, IPMA-SCP
  Management Analyst
  County of San Mateo
  Honolulu, Hawaii

- Raoul Mendoza, IPMA-SCP
  Chief Management Analyst
  City of Los Angeles Department of City Planning
  Los Angeles, Calif.

- Mike More, IPMA-CP
  Risk Manager
  City of Oxnard
  Oxnard, Calif.

- Jennifer Morrow, IPMA-SCP
  Program Analyst
  Transportation Safety Administration
  Nokesville, Va.

- Alissa Penney, IPMA-SCP
  Owner/HR Consultant
  A Better HR
  Abilene, Texas

- Somphanat Phengphanh, IPMA-CP
  Human Resources Analyst I
  Bay Area Air Quality Management District
  San Francisco, Calif.

- Jennifer Renner, IPMA-CP
  HR Specialist
  Air Force Materiel Command Staffing OL
  U.S. Department of the Air Force Beavercreek, Ohio

- Carrie Rowley, IPMA-CP
  Human Resources Assistant
  Town of Oro Valley
  Oro Valley, Ariz.

- Elizabeth Schalau, IPMA-SCP
  Employment Recruiter Specialist
  Charleston County North Charleston, S.C.

- Charla Skiles, IPMA-CP
  Human Resources Analyst
  Pinal County Human Resources Florence, Ariz.

- David Smith, IPMA-CP
  Human Resources Assistant
  Fairborn, Ohio

Did You Miss a Webinar?

2020 Offers a Plethora of Online Learning Opportunities

Your Association membership earns you free, unlimited access to every webinar archived at learning.ipma-hr.org/webinar.

Bookmark the page to stay current as sessions are added. For now, catch up with:

- Government Affairs Update for January 2020
- Best Practices in Police Recruitment: How the Metropolitan Police Department Continues to Thrive in a Challenging Environment
- Change Management: Driving Culture Change Through User Adoption
- Conducting Effective Internal Investigations
- Getting Started With People Analytics
- Safe Conversations: Dialog That Transforms Workplace Culture
- Government Affairs Update August 2019

And more. —∞
### New Ethics Training Available

IPMA-HR invites you to participate in the initial offering of Developing an Ethical Culture in an Organization. The pilot course is being planned right now, and enrollment fees for the first group of enrollees will be discounted by 20 percent.

Completing the course will enable participants to:

- Identify and comprehend traditional and current issues in workplace ethics,
- Develop the skills needed to analyze and resolve ethical dilemmas in the workplace,
- Discuss ethical dilemmas, and
- Identify and analyze metrics to assess and improve their workplace’s ethical culture.

The new self-paced course concludes with a 3-hour videoconference to allow participants to debate and propose responses to realistic scenarios presented by a trained facilitator.

Participation is open to employees at all federal, state and local public sector organizations, and enrollment is not limited to HR professionals.

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