

Item Worksheet - Item 7.3

This sample reflects the thinking of a single examiner and should not necessarily be viewed as a "right" or "wrong" assessment of the applicant.

Workforce-Focused Outcomes

Relevant Key Factors

- Workforce profile:** Applicant has 1,080 associates: 682 CSRs, 158 administrative staff, 157 professional staff, and 83 management staff; 92% of associates are full time, 8% are part time.
 - Education: For CSRs and administrative and professional staff, 6% have graduate degrees, 22% have bachelor's degrees, 53% have associate's degrees, and 100% have a HS diploma; 78% of management staff have college degrees
 - Gender: 68% female, 32% male; ethnicity: Caucasian 40%, African American 24%, Hispanic 26%, Native American 3%, Asian American 7%
 - No organized bargaining units
 - Workforce increased by 18% with acquisition of Widmark Mortgage.
- Workforce engagement factors:** Environment of empowerment (all), opportunity for career progression/promotion/career path (all), desire to serve customers (CSRs), opportunity to contribute to TNB/local community/state/profession (professional and management staff)
- Workforce satisfaction factors:** Job security, resources and skills to succeed, competitive compensation and benefits, ability to work on teams (CSRs, admin. staff); physical safety and security (CSRs); schedule flexibility (CSRs, admin. staff, professional staff); ability to invest in career, challenging and rewarding work (professional and management staff)
- Comparative data sources:** Baldrige Award recipients—service benchmarks; DemoGraph Surveys—Legendary Service metric; customer satisfaction/engagement—associate engagement survey; *Financial Pulse* magazine Best Places to Work Survey—associate satisfaction/engagement
- Regulatory requirements:** Follow compliance with state and federal Occupational Safety and Health Administration (OSHA) and Equal Employment Opportunity Commission (EEOC) requirements

Strengths

Strengths/OFIs should be placed in order of importance to the applicant.

Relevant KF	++	Strength	Evidence	L	T	C	I	Item Ref.
3,4,5		Results for workforce health and safety demonstrate beneficial trends and compare favorably with benchmark comparisons. <div style="border: 1px solid black; background-color: yellow; padding: 5px; margin-top: 10px;"> Write a brief sentence to concisely tell the applicant the strength. This sentence may be used later as the basis of the 1st sentence in a feedback-ready comment. </div>	Absenteeism Rate (Figure 7.3-7) widely surpasses industry average consistently from 2006 to 2010. In 2010, average 7 days away from job, compared with approximately 17 days as the industry average. OSHA TRR (Figure 7.3-8) improved from approximately 1.8 in 2006 to 1.4 in 2010, compared with the OSHA 80th percentile comparison of 1.5 in 2010. Number of Workers' Compensation Claims (Figure 7.3-9) was zero for 2009 and 2010, after ranging from 1 to 2 in 2006 through 2008 and outperforming the Baldrige recipient benchmark in all 5 years. Associate Satisfaction with Security (Figure 7.3-10) improved for all regions from 2007 to 2010, with all regions exceeding 95% satisfaction in 2010, compared with the DemoGraph 90 th -percentile benchmark of 90% in 2010.	X	X	X		a(2)
1,2,3		The applicant demonstrates beneficial current levels and trends for associate satisfaction in 3 of 4 workforce segments, with positive comparisons to the DemoGraph 75 th -percentile benchmark.	Current levels for management and administrative staff are positive: 91% and 95% satisfaction, respectively (Figure 7.3-1). Improving trends for 3 of 4 workforce segments from 2007 to 2010: management staff from 85%	X	X	X	X	a(3)

Relevant KF	++	Strength	Evidence	L	T	C	I	Item Ref.
			<p>to 91%, professional staff from 83% to 88%, and administrative staff from 88% to 94%.</p> <p>All segments (except professional staff) exceed benchmark performance from 2007 to 2010.</p> <p>Aligned with success factor of engaged and highly satisfied workforce.</p>					
1		Results for measure of workforce capacity demonstrate favorable levels.	Vacancy Rate (Figure 7.3-6) was <1% in 2009 and 0% in 2010, meeting the organization's goal.	X	X			a(1)

++	Feedback-Ready Strength Comment	Item Ref
	Results for measures and indicators of workforce health and safety show a beneficial trend and compare favorably with benchmarks. For example, in the last five years, the level of associate absenteeism has generally been less than half that of the industry average (Figure 7.3-7). Additionally, the organization's OSHA TRR has consistently outperformed the OSHA 80th percentile for recordable cases (Figure 7.3-8).	a(2)

Opportunities for Improvement

Concisely state the feedback in the first sentence of the comment. Provide additional key evidence, such as 1–2 examples of results. It is not necessary to include every bit of data you have noted. Focus the evidence on the most relevant evaluation factor(s) (e.g., levels, trends, comparisons, integration). Limit the length of the comment to 75 words or 500 characters of text.

Relevant KF	--	Opportunity for Improvement	Evidence	L	T	C	I	Item Ref.
1		Limited segmented data are provided in the workforce results presented.	<p>Data are not segmented for:</p> <ul style="list-style-type: none"> Associate Engagement (Figure 7.3-2) Training Hours per Associate per Year (Figure 7.3-5) Vacancy Rate (Figure 7.3-6) Absenteeism Rate (Figure 7.3-7) OSHA TRR (Figure 7.3-8) Number of Workers' Compensation Claims (Figure 7.3-9) <p>Satisfaction with Training (Figure 7.3-3) segments out only former Widmark employees from applicant overall data.</p>				X	a(3)
1,2,3		Results are missing for measures and indicators of workforce and leader development.	<p>Legendary Service is a principal success factor for the organization (P.2-2)</p> <p>Important customer relationship skills include service recovery and advanced communication skills as well as CSR training, yet there are no indicators of development in these areas</p> <p>Applicant indicates that associates identify learning needs as part of PMDP performance reviews (5.2c[2]); however, outcomes of training are not provided.</p>	X				a(4)
1,2,3		The applicant has not provided results for appropriate workforce skills.	<p>Examples of appropriate workforce skills and development results not provided:</p> <ul style="list-style-type: none"> results for measures of LDS participation & outcomes learning outcomes related to cross-training associates' ability to work on teams 	X				a(1)

Relevant KF	--	Opportunity for Improvement	Evidence	L	T	C	I	Item Ref.
			associates' ability to respond to transition issues familiarity w/Widmark accounts numbers of associates progressing in their careers as a result of education and training					

-- Feedback-Ready Opportunity for Improvement Comment								Item Ref
Results are missing for measures and indicators of workforce and leader development. For example, Legendary Service is listed as a principal success factor (P.2-2) for the organization, yet no results are provided for workforce development in this or other areas of customer relationship skill development, such as service recovery or advanced communication skills.								a(4)

Notes

Scoring

Score Range: 30-45%
 Score Value: **35%**