

The meeting will be most efficient if one student from your group volunteers to run the meeting and keep it on time. Either Prof Harris or Prof. Fichman will be there for portions of the meeting as well.

Start by thanking them for their willingness to partner with your team.

Let everybody introduce themselves.

Some questions to ask:

1. Establish who the client is. Let them tell you about their day job. Are they on the technical side with knowledge of the data or are they on the domain expert side?
 - Graham Rothrock- exit interviews - positions turning over, succession planning and acquisition
 - June Harley- HR management systems - responsible for data that is kept, partner with IT, Chronos, action codes + reason codes + statuses
 - David Albright - ERP specialist - administration and analysis and special reporting of all systems at county level - extracting data
 - i. Will be ready to assist with our questions on data
 - Sherri Bigelow - enterprise application manager - on team w David - work closely with June
2. How do you classify turnover - what does turnover look like in the data that you've given us?
 - Positions becoming vacant
 - Voluntary or involuntary depending on circumstances
 - Transitions between departments within the county but mostly people who leave positions with the county
3. What would the perfect solution look like for you?
 - Retain the person in the first place - time, effort and resources are put into making person successful in their role
 - Intervening when there is someone who is performing lowly
 - Make sure talent development group has resources to make employees successful
 - Look at someones hours - scheduled for more hours than originally agreed upon - other indicators of employees who are at risk
 - Current vacancy rate of budgeted positions 13%
 - Turnover brings in employees are not fully trained
 - ¼ of workforce is either not there or brand new
 - Stay interviews are a resource issue
 - "Why should I engage in stay interview process if person is predicted to leave?"
 - Cost/benefit
4. Can you describe the data we've been given?

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5. What drives turnover at Guilford Co?

- Age (retirement), Supervisors, Coworkers,
- Local government is not ideal position - role is a “foot in the door” position
- Leaving for another organization
- Retirements
- “Terminated other” - unspecified action reason
- Exit interviews for the past year
- Exit interview is voluntary - county tries to incentivize employees to participate
- HR employee conducts exit interviews

6. How do you address turnover risk currently? - Current business as usual process

- Are there any interventions that you currently use?
- No interventions currently in place - no expectation county wide
- Supervisors keep tabs
- How did turnover rate change after the intervention? What features make the most difference? (dataset about intervention & improvement)
- For cost/benefit: The budget on this intervention project.
- People are not at risk for quitting or leaving the position due to turnover lag - general sense of government duty among employees - sense of responsibility

7. What are the frictions or complexities in the business as usual decision making process - if any?

8. How are stay-interviews initiated? By HR-reps, supervisors? - in which ways do those stakeholders need to be notified that an employee is at risk of leaving

- Who is using our dashboard?
- Initially HR and then moved to supervisors of teams
- Rely on supervisors to conduct stay interviews

9. Ask them how much involvement they are willing to have with the team? Can we email you questions? How often? What is your preferred method of communication?

- Graham & June & David - email as frequently as we need

10. What features of a web application do you envision being useful to Guilford County HR in visualizing turnover risk?

- Visual - flag an employer
- What data points are connecting
- Connect reason - what did we see in the data that makes them a risk?

11. Goal: Predict likelihood of turnover, create web application & (intervention recommendations?)

Close by reiterating your appreciation for their time.

Describe data sets

Termination reports - termination over last 5 or 6 years

- might have an error - not just terminated employees

- filter to just grab T1, T2 and R1, R2, R9

T2 and R2 are terminated and finalized - without pay and without benefits

T1, T1 and T9 are terminated and

Active Status - A1, A2, L1, L2

Focus is on staff with benefits!

Staff with hourly pay are temporary or part time

We care about terminated staff that held benefitted positions

HR893- Employee Job code History as of 1/12/22

- employees of all time

- are these just benefitted positions?

Track who moves from benefitted position to temp /hourly positions with Reason Codes

HR 863 - position transactions - helpful to join with 893

*feel free to reach out for data set walkthroughs and descriptions

*have changed the way paygrades were looked at December 2018

Will see MUSA_EMPLOYEE_EXTRACT column AN -

Pay plan Schedule column - SPABC

MUSA_EMPLOYEE_EXTRACT

MUSA_PAEMPLOYEE_EXTRACT

- Join tables by employee ID
- Complementary information

Halogen Extract - employee reviews & evaluations

- No score because not every 2021 log has been reviewed yet
- If people leave in the midst of evaluation - termination or retirement = no score

Department director who report to board will have a no score - board reviews them outside of halogen system

New data sets :

Hours for each employee - year by year analysis of increased hours worked