

B09 – Trends in Talent Retention, Engagement and Attraction: How They Impact a District's Bottom Line

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Agenda

1 The State of the Workplace

2 What's hot in people and benefits planning

3 Open enrollment education example

4 Culture, leadership, recognition and wellbeing

5 Workplace solutions for financial wellbeing

6 Emotional wellbeing in the workforce

7 Q&A



The State

Leaders in the K–12 education sector have spent the past three years reconfiguring a new normal.

Employee Wellbeing

As leaders focus on creating an environment that retains employees and fulfills districts' mission statements, staff and student wellbeing is top of mind. Educators are entering a new phase, which requires the ability to discern what leadership skills and cultural attributes are needed to reinvigorate their districts.



Organizational Wellbeing

Everything that affects the success of your business



It's all connected.

Sustaining staff levels, optimizing processes and strengthening culture are top priorities.

A benefits-based strategy that reflects diverse employee interests also helps boost attraction and retention success.

Top Operational Priorities

1

Retaining Talent

2

Attracting Talent

3

Controlling
Employee
Benefit Costs

Given staffing concerns, technology's efficiency **can reduce administrative burdens**, especially if qualified staff apply them to multiple initiatives.

Reasons for investing in HR technology



Generative AI Considerations

Ethical & Legal Implications

Ensure compliance with data protection and privacy laws, considering potential biases or discriminatory outcomes that may arise from the AI system

Transparency & Explainability

Ensure the AI system's decision-making process is understandable and can be audited. This is particularly important in public entities where accountability and fairness are crucial

Data Quality & Bias

Ensure the data used to train the AI system is of high quality, representative, and free from biases. Public entities should be especially cautious about potential biases that could disproportionately impact certain groups or perpetuate existing inequalities.

User Safety & Wellbeing

Assess the risks associated with AI-generated content, such as ensuring that it does not contain harmful or inappropriate material.

Resource Allocation

Implementing generative AI systems requires significant resources, including computational power, data storage, and skilled personnel. Evaluate whether you have the necessary resources to support the implementation, maintenance, and ongoing development of the AI system.

Stakeholder Engagement

Engage various stakeholders, including teachers, students, parents, and the wider community, to ensure their concerns and perspectives are considered. Their involvement builds trust and addresses potential issues or misunderstandings.

Impact on Jobs & Workforce

While AI can automate certain tasks, it may also create new opportunities and require reskilling or upskilling of employees. Public entities should consider the implications for staff members and plan accordingly.

Long-term Sustainability

Generative AI systems require continuous monitoring, updates, and improvements. Employers should consider the long-term sustainability of using such systems, including the availability of funding, technical support, and the ability to adapt to evolving needs and regulations.

More K–12 employers are considering new resources to reinforce wellbeing.

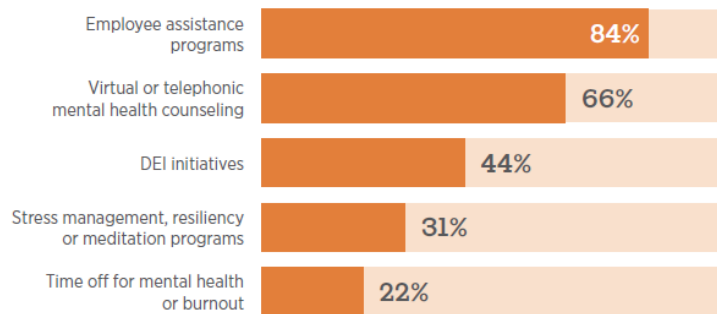
Districts continue to invest in mental and behavioral health programs while exploring ways to cultivate camaraderie among employees.

High healthcare costs continue to be a top concern for K–12 educators. Most increased medical or pharmacy cost sharing in 2022, but mindful of retention and attraction priorities, many others did not.

More than
4 in 5 Increased their focus on employee emotional wellbeing in 2023

46% Support wellbeing with company-sponsored gatherings (e.g., holiday parties)

Components of emotional wellbeing initiatives



Top healthcare cost-management challenges

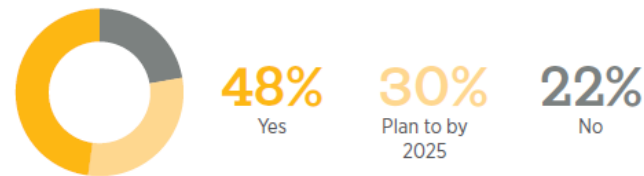


Skill growth opportunities can counteract burnout and increase engagement

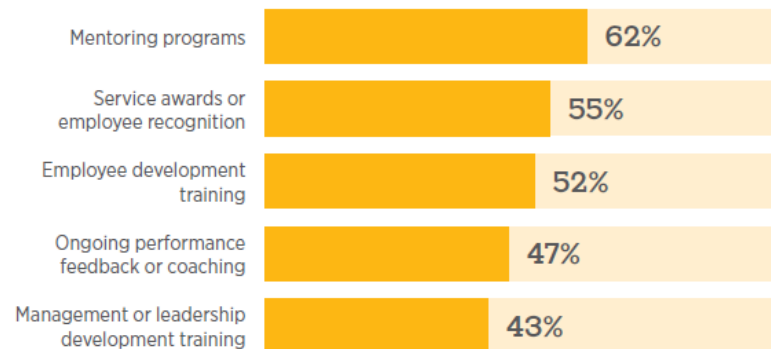
Showing appreciation for employees through communications, on a regular basis, helps reduce the harmful effects of stress.

Offering staff training on preferred topics can revive a sense of connection to their careers and equip them with the skills they need to address current challenges.

Have conducted a survey to measure employee engagement

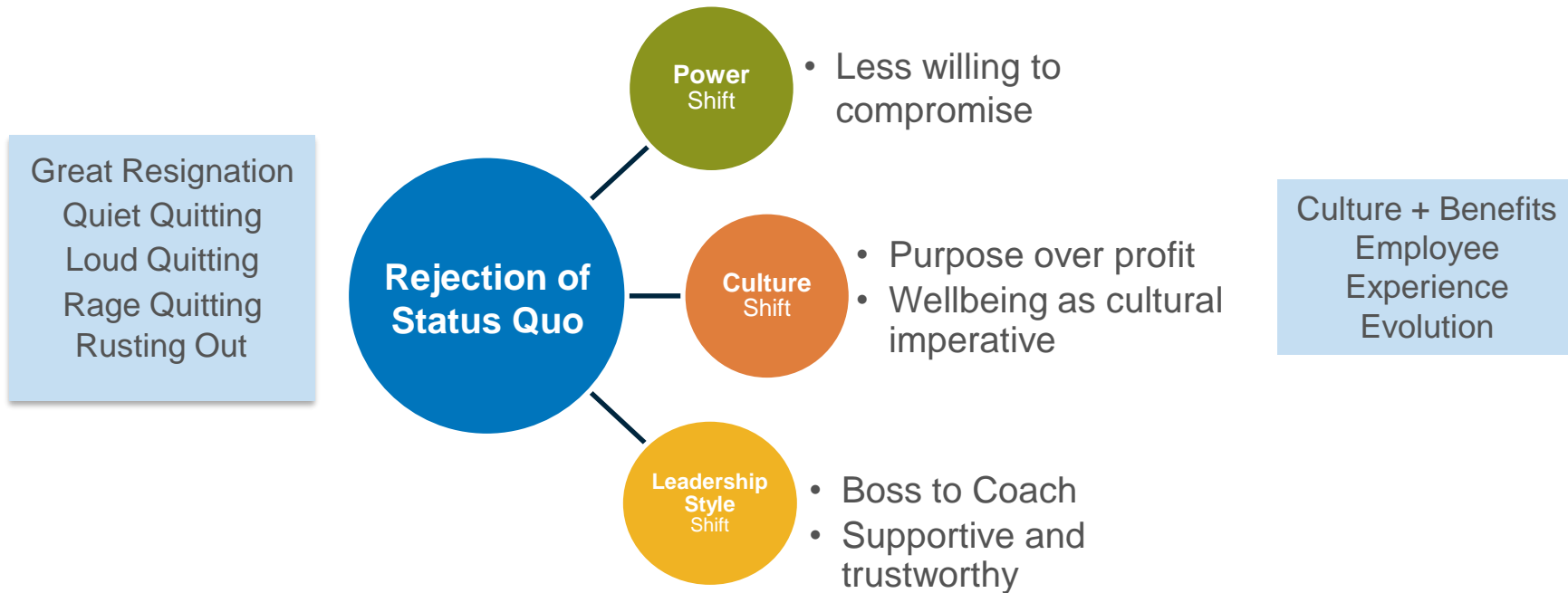


Components of career wellbeing initiatives



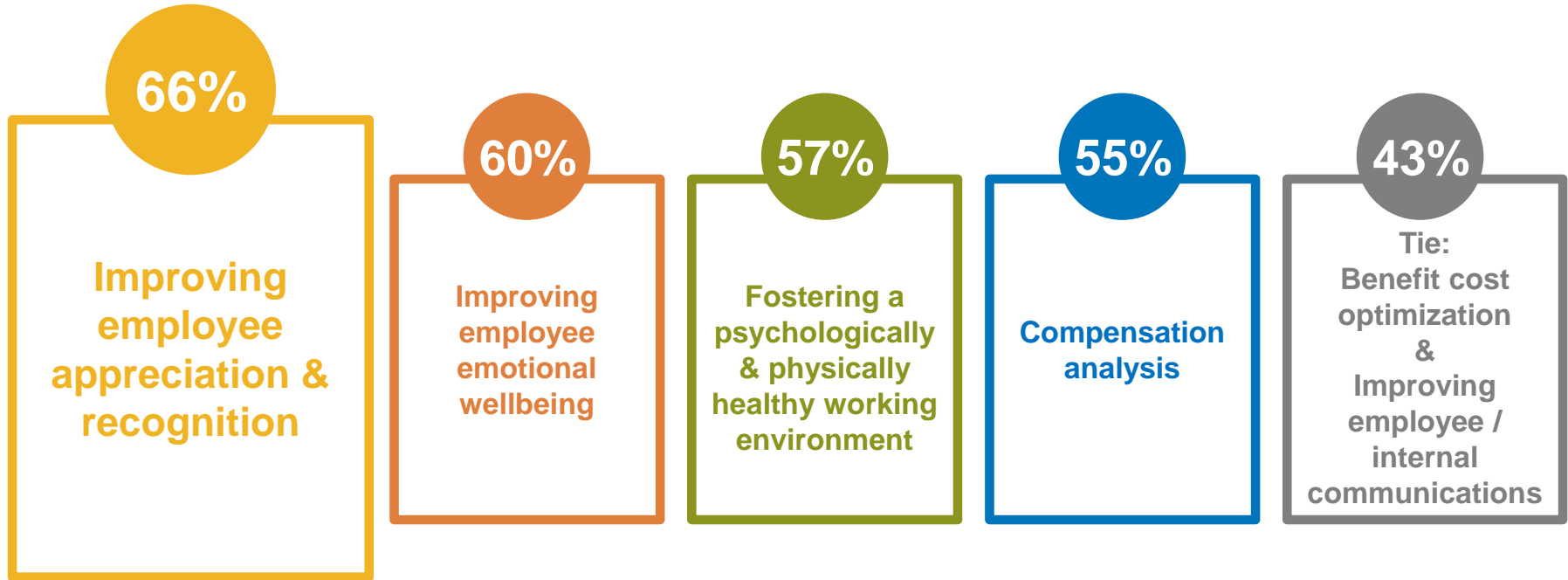
We've changed

New priorities are changing how we feel about work



Strategic Priorities

What are your top five (5) strategic priorities for attracting, retaining and engaging talent in 2024?



Gallagher Organizational Wellbeing Poll 4: December, 2023

Recruitment Focus Areas

Beyond base salary, which two (2) components do you leverage the most to attract key talent?

1

Culture

2

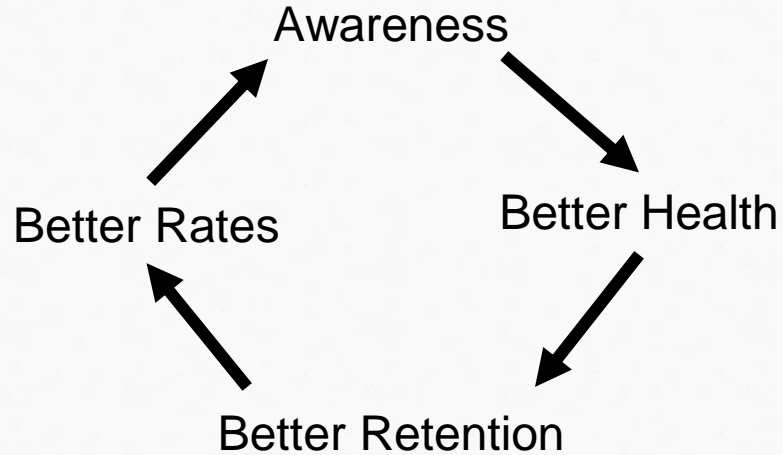
Insurance benefits

Open Enrollment Education Example




Annual Open Enrollment

XYZ Schools
October 2023



WE CARE ABOUT YOU!



2024 Open Enrollment Meeting
October 2023

The Agenda

- Insurance 101 – Terms & Vocabulary
- PA 152 – “The Hard Cap”
- 2024 Premium Rates
- How do deductions work?
- Scenarios – What plan may be best for you?
- Health Savings Accounts (HSAs) and the Loan
- Flexible Spending Accounts (FSAs)
- Optional Coverages
- The Blue Cross Blue Shield (BCBS) website
- A walk-through of our open enrollment form

Calculator Example

2024 Open Enrollment Meeting
October 2023

Employee Group

TKEA

Enrollment

Family

Your Estimated 2024 Health Care Expenses

\$ 35,000.00

* **Disclaimer:** Blue Cross negotiates discounts with hospitals, doctors, and other health care providers, so it can be difficult to estimate your projected expenses.

Plan	Biweekly Cost	Annual Cost	Deductible	Annual Out of Pocket Cost w/ Deductible	Coinsurance Based on your estimate above	Estimated Annual Out-of-Pocket Expense (In-Network)
Select PPO (\$250/500 0% Co)	167.12	4,010.88	500.00	4,510.88	-	4,510.88
Versatile PPO (\$250/500 10% Co)	52.86	1,268.64	500.00	1,768.64	3,450.00	5,218.64
Flexible Blue 2 (\$1600/3200 0% Co)	-	-	3,200.00	3,200.00	-	3,200.00
ABC (\$1600/3200 0% Co)		2,749.89	3,200.00	5,949.89	-	5,949.89
Choices (\$300/600 0% Co)		7,362.57	600.00	7,962.57	-	7,962.57
Choices (\$500/1000 10% Co)		3,827.73	1,000.00	4,827.73	3,400.00	8,227.73
Essentials (\$375/750 20% Co)		(2,959.35)	750.00	(2,209.35)	6,850.00	4,640.65

Based on the information provided above, your lowest cost option is most likely

Flexible Blue 2
(\$1600/3200 0% Co)

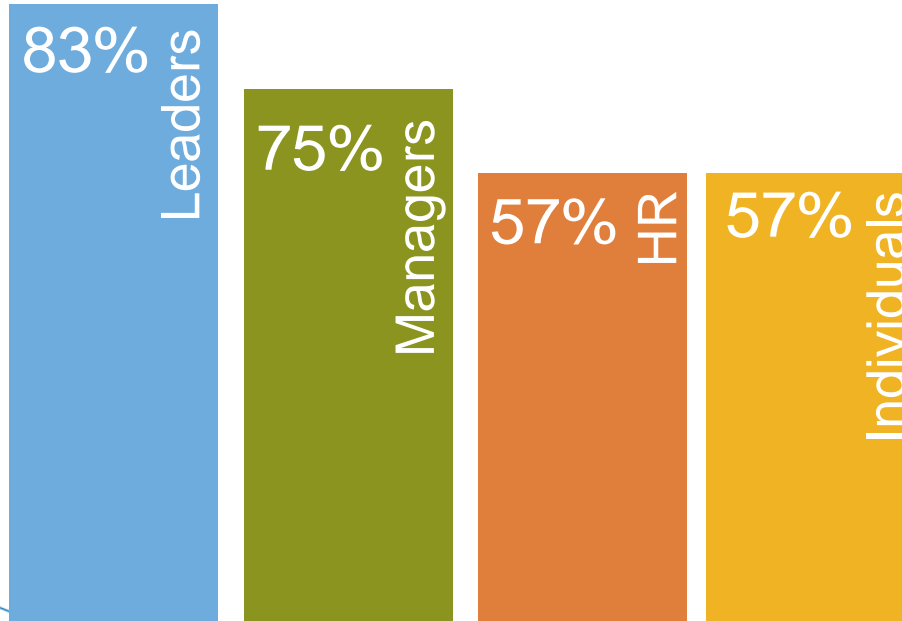
Disclaimer - Each individual situation merits different considerations to determine which plan is best for you. The information provided above is for illustrative purposes only and is not intended to provide a definitive decision. Thornapple Kellogg Schools does not endorse any medical plan over any other, nor does it bear responsibility of any employee plan decisions.

Culture, Leadership, Recognition and Wellbeing



Whose job is it to shape/create it?

What's the connection to benefits and wellbeing?



October, 2022
US Surgeon General Advisory Warning

*Toxic workplaces are harmful
to physical and mental health.*



1 in 3

employees say their manager fails to
recognize the impact they have on
their team's mental wellbeing (35%)

Leader Competencies

What are the most significant leadership or managerial competencies that are required for success in your organization?



**Communicating
effectively**



**Building
trust**



**Fostering a sense
of belonging**



**Managing
conflict**



**Tie:
Strategic thinking
&
Modeling positive
behavior
&
Being respectful and
inclusive**

Managers are Multipliers

How much do you rely on people managers to share/reinforce corporate information with their teams?

A blue circle with a white border containing the text '84%'.


84%

Say they rely on managers for communication

A blue circle with a white border containing the text '3 in 5'.

3 in 5

Say people managers are below expectations when it comes to communicating

A large blue circle with a white border containing the text 'When managers are better communicators, employees have better understanding'.

When managers are better communicators, employees have better understanding

But How?

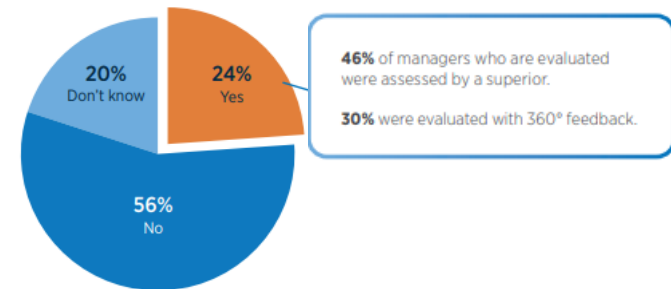
How can we inspire managers to become communication leaders?

Provide Resources

- 1 82% On-demand learning
- 2 74% Written/downloadable resources
- 3 67% Managers-only forum/channel
- 4 65% Communications training
- 5 63% One-on-one communications coaching/mentoring

Accountability

Managers evaluated on communication are **2x more likely** to meet and exceed communicator expectations



People Metrics

What are the most important people metrics for determining future business success in your organization?

①

Employee Engagement



Most used listening channel, with a 79% perceived effectiveness rating

②

Trust in Leadership

③

Turnover Rate



Recognition as a



**More
Productive**



**More
Loyal**



**More
Resilient**

7%

*Our recognition efforts are
valued by our employees*

1. Worthy/Meaningful
2. Specific
3. Authentic
4. Timely
5. Public**
6. Platinum Rule

26%

*Provide best practice
training to managers*

The “Why” for Wellbeing

Select your top five (5) objectives for promoting wellbeing in your organization:



**Increase job
satisfaction &
employee
engagement**



**Attract &
retain talent**



**Lower risk of
employee
burnout**



**Reduce
absenteeism**

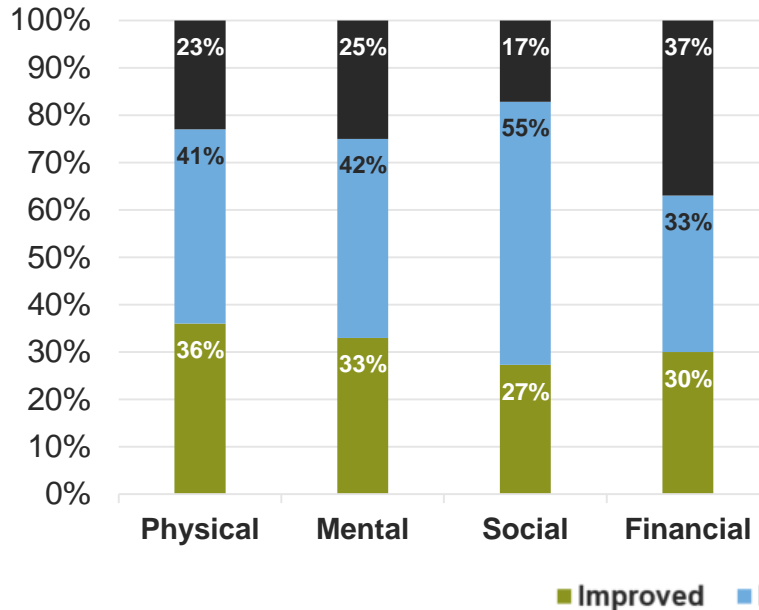


**Manage
healthcare
costs**

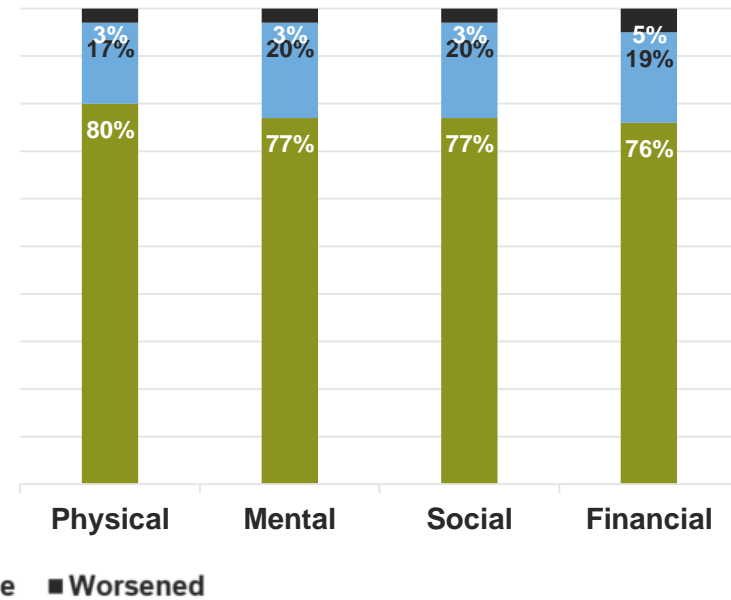
Tackling the Wellbeing Blindside

Blindside (noun): a direction in which a person has a poor view, typically of approaching danger.

Employee perspective on how their wellbeing changed



C-Suite perspective on how employee wellbeing changed



Climate & Culture

As a district, we feel we have good leadership... but how can we make it great?



Exit Interviews

present an excellent opportunity to learn what is going well... and what is not.

- What is your primary reason for leaving?
- What could have been done to keep you?
- What aspect of your work here are you most proud of?
- What does the school district need to do better? More of? Less of?
- What advice would you give to the person hired to replace you?
- If you could share anything with a past or current staff member, what would it be?
- Open ended....

Climate & Culture

As a district, we feel we have good leadership... but how can we make it great?



- Is this position / school what you thought it would be when you applied?
- Reflect on the structure and cohesiveness of the team.
- What does the school district need to do better? More of? Less of?
- How is the atmosphere and culture of your building / department?
- What goals do you have for this year? Five years? Ten?
- Open ended....

'Stay' Interviews

must be strategic in questions...
provide an opportunity for feedback
and to allow staff to be heard.

Climate & Culture

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must be strategic in questions... provide an opportunity for feedback and to allow staff to be heard.

- Both provide valuable feedback, but do take a significant amount of time
- Answers / Data must be synthesized and presented to leaders in a constructive manner
- Each presents challenges:
 - Negative exit interviews – “just a disgruntled employee”
 - Stay interviews – employees may not feel comfortable providing truthful feedback for fear of retaliation

Climate & Culture



Organizations must provide employees with an opportunity to make their voice be heard in a meaningful way.

Schools present an extremely unique challenge, as time at work = time with students

Traditional surveys through Google Forms, Survey Monkey, etc. were not meeting our needs, and staff worried about anonymity.

In January, we began a new journey with a software that creates a culture of continuous feedback... and uses AI to provide actionable steps based on the results.





Our smart surveys

Simple, automated, anonymous surveys ensure high response rates, consistent participation, and honest feedback from your students, staff, and parents.

Gathering Feedback

Sophisticated question-sampling techniques mean regular surveys deliver up-to-date data without survey fatigue.

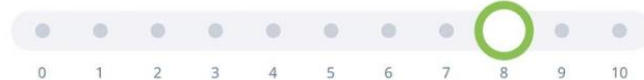
Surveys are always anonymous to ensure feedback from your school community is open and honest.

Respondents can leave comments on each question and provide context to their scores.

AI technology gives suggested responses to comments so school leaders can efficiently manage feedback.

Question 1

I believe my school has a bright future



I'm happy that the plans put in place by the Principal address the issues I have and that they will make a big difference to our working environment and to the students.

Cancel comment

Climate & Culture



Satchel Pulse

Assess culture and climate

Get a holistic view of climate and culture with school or district insights across key areas for staff, students and parents. The dashboard provides users with an overview for each surveyed group. The pillars provide an opportunity to evaluate successes and areas of improvement for each group. Survey results are calculated instantly and updated automatically for immediate use.



Climate & Culture



Track the trends

Follow the trends over time for each key area and see whether issues are a short term blip or a long term decline. Reporting options include examining trends for each climate and cultures pillar over time. Quickly evaluate stakeholder feedback and changes throughout the school year. Hover over data points to collect additional information on that particular pillar.



Make informed decisions

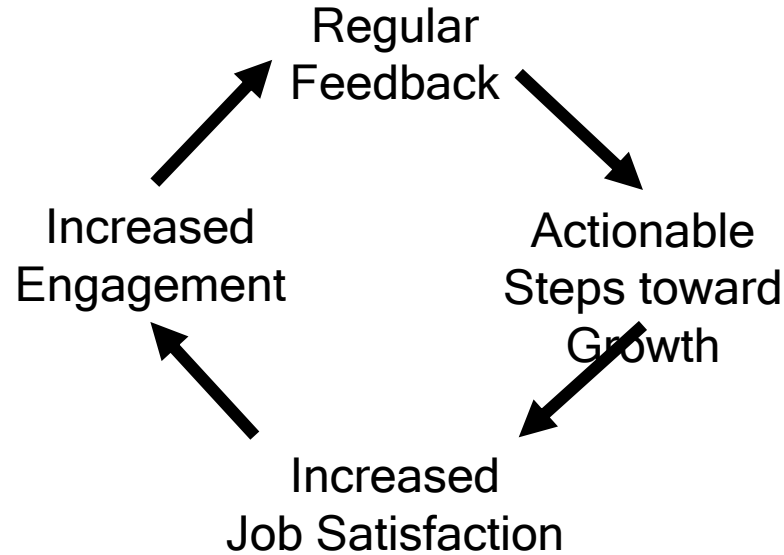
Dashboards help you decide where you should focus your intervention efforts and ensure your time and budgets have the best return. Districts and schools can use a variety of reporting tools to break down data by a variety of subgroups. This ensures that leaders have a pulse on who the voices represent and whether they need to take action.



Climate & Culture



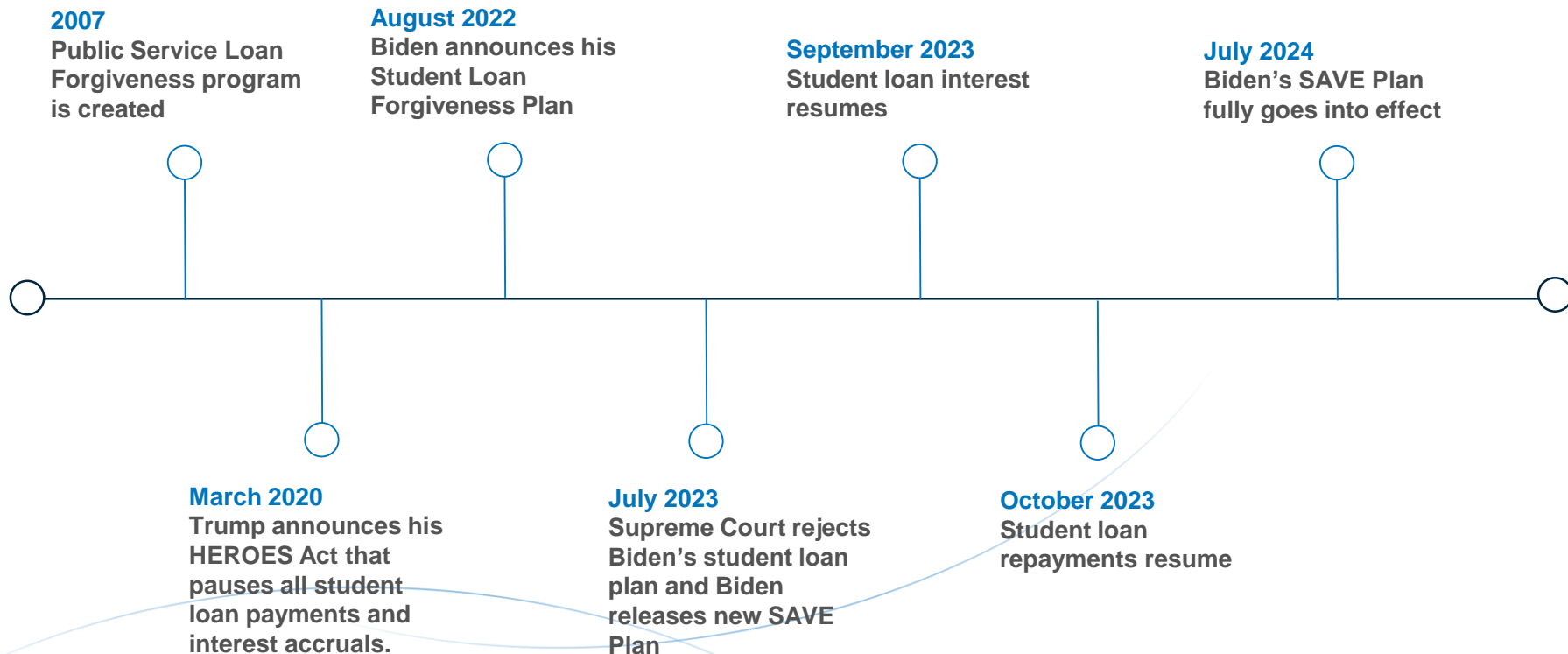
Important: Receiving staff feedback about their level of satisfaction is just one piece of overall picture.



Workplace Solutions for Financial Wellbeing

Timeline

In the news: Student loans



What is the Public Student Loan Forgiveness (PSLF) program?

In the news: Student loans

Created by the federal government to incentivize professionals to take jobs in government and non-profit organizations

“10 years to student loan forgiveness”

Forgives the remaining balance on your Direct Loans after you have made the equivalent of 120 qualifying monthly payments while working full time for a qualifying employer

Who Qualifies for PSLF?

The Criteria

- Work for a qualifying employer
 - Government – federal, state, city, tribal
 - 501(c)(3) – Not-for-profit organizations that are tax-exempt under Section 501(c)(3)
 - Other – Other not-for-profit organizations that can provide certain qualifying public services

- Full-time employee
 - 30+ hours per week

- Direct loans

- Income-driven repayment plan

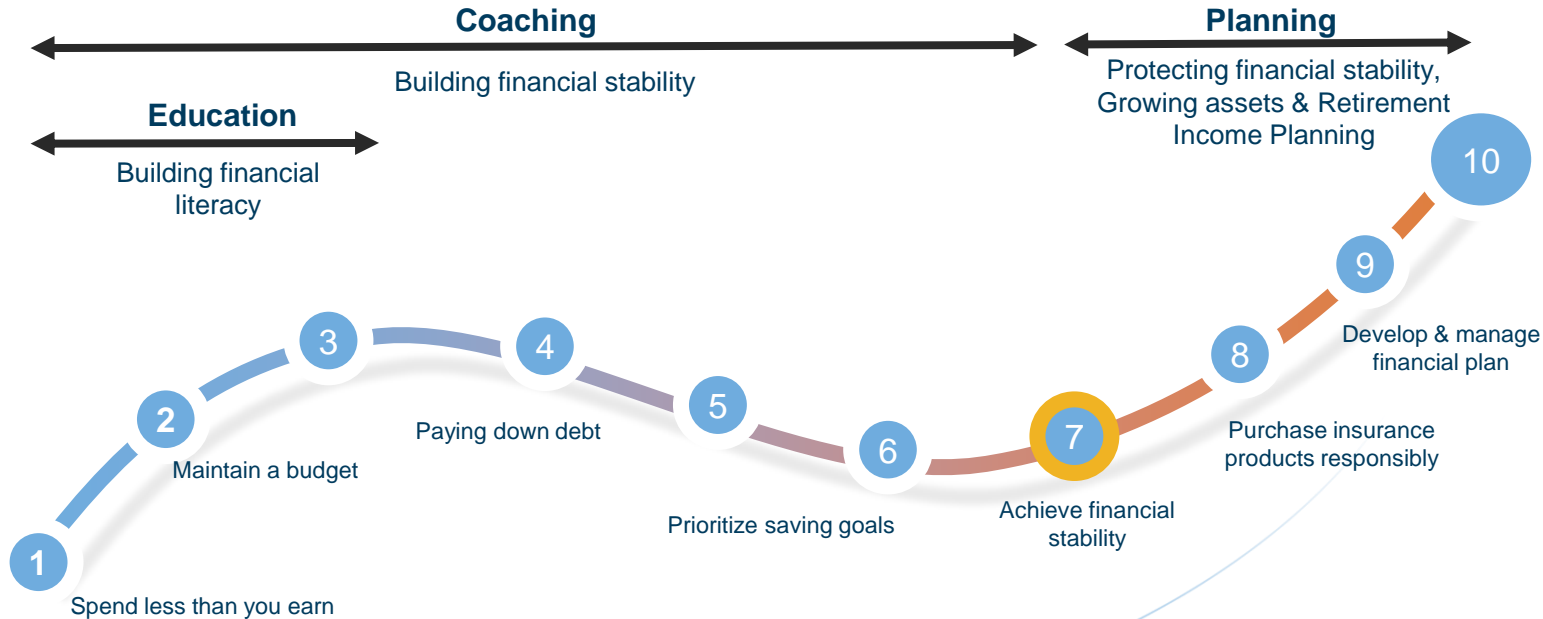
- 120 on-time qualifying payments – forbearance period counted toward qualifying payments!

Michigan Student Loan Repayment Program

The Michigan Department of Education grant (27K)

- \$225 million dollars has been allocated to help alleviate monthly student loan payments for educators.
- The district staff member **must be enrolled** in the **Public Service Loan Forgiveness** program.
- The district staff member must be enrolled in an [income-driven repayment plan](#). *The district staff member may be exempt from this requirement if their loan is not eligible for income-driven repayment.*
- The district staff member must currently work **32 hours or more per week** at a district or intermediate district in a role in which the individual works directly with pre-K to 12 students, ***including but not limited to educators, counselors, social workers, psychologists, reading specialists, librarians, and school administrators who work directly with students.***
- Employees will eligible for up to \$200 per month in student loan repayment (\$400 for band 6).
- Deadline for initial wave of applications was April 11th
- It is being suggested that additional application periods may be opened
- Senator Camilleri press release on April 16th

Breaking Down the Financial Journey



Emotional Wellbeing in the Workplace



Resources

- Family caregiving support vendors (e.g. HomeThrive)
- Mental health coordination services (e.g. Care Solace)
- Carrier resources
 - In-person
 - Telehealth
 - Digital
- Standalone digital resources
- Using the workplace to create connection and combat loneliness
- And remember, it's all connected
 - Physical wellbeing resources
 - Financial wellbeing resources
 - Career wellbeing resources



Emotional Wellbeing

Steps in Building YOUR Toolbox

1

Inventory Your Current Resources/Partners

2

Identify **Gaps** In Your Offerings

3

Review Your **Partners** For Cross-Over and Missing Solutions

4

Gather **Feedback** From Your Employees

5

Promote and **Communicate** Your Programs

6

Train **Leaders/Managers** In All Offerings



Thank you!

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