

Management Challenges

Co-Chairs: Karen Davis, RTI and Jane Shepherd, Westat

This panel provides a venue for presenting and discussing the management and administrative challenges in today's CAI environment.

There are two sessions and within each of these topics, the panelists and a moderator address current issues, approaches taken, and lessons learned.

The approach is to discuss the techniques used in different organizations to address key management issues, participate in a discussion of these issues, and have an opportunity to ask the panelists about effective approaches to common situations

Management Challenges

- Panel 1 – Management challenges associated with the changing landscape of data collection
- Panel 2 – Management challenges associated with staffing the survey lifecycle

Panel 2: Management Challenges associated with staffing the survey lifecycle

This panel will discuss challenges staffing all phases of a survey project including methodologists, operations, programming, and field staff.

The current recruiting environment for staff is highly competitive and the panel will explore approaches to staff engagement and retention such as offering staff career opportunities, additional compensation, mentoring and training.

Panel 2: Management Challenges associated with staffing the survey lifecycle

The panel will discuss:

- the challenges they are encountering,
- how they are handling retention and succession planning, and
- ways to maximize human capital.

Management challenges associated with staffing the survey lifecycle

Moderator: Jane Shepherd, Vice President, Westat

Panelists:

- Grant Benson, Director of Data Collection Operations, Survey Research Center, University of Michigan
- Deborah Bittner, Director, Survey Research Center, Social & Scientific Systems, Inc.
- Debra Coaxum, Director of the Office of Oil, Gas, and Coal Supply Statistics, US Energy Information Administration
- Kyle Fennell, Associate Director of Field Operations, NORC
- Joshua J Keller, Manager, Strategic Workforce Planning Program, US Census Bureau
- Chris Manning, Program Manager for Current Employment Statistics (CES) Survey, Bureau of Labor Statistics

Addressing Attrition at the University of Michigan's Survey Research

Grant Benson
University of Michigan

Faculty and Professional Staff Retention

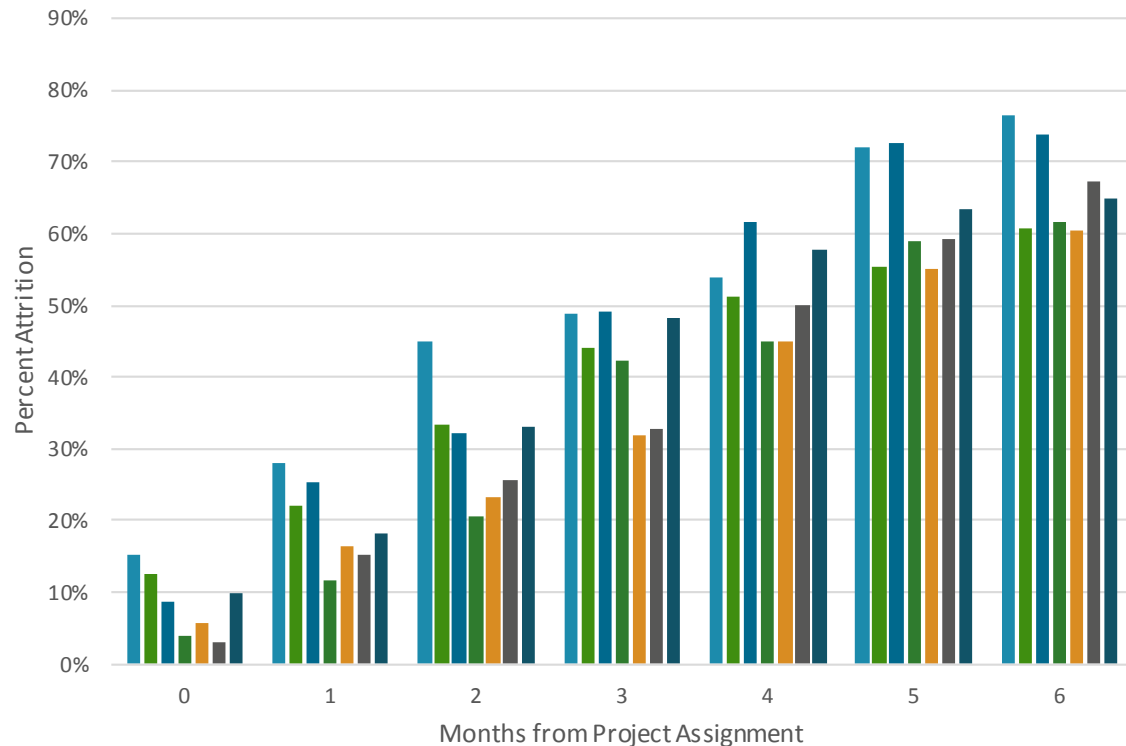
- Faculty renewal and recruitment
 - Fellowships and postdocs
- Professional staff
 - Cross-training, job expansion
 - Ongoing professional development via seminar conference learning, “lunch and learn”, “summit” on variety of topics (technical systems, recruitment processes, etc.)
- Promise students
 - Provide tuition support for graduate students in return for part time employment and 2-year post-graduation commitment

Interviewer Attrition: Problem Statement

- Attrition is (fairly) predictable, but is costly
- We generally distinguish between project based and Center based attrition

- An interviewer may leave a project because of a poor fit or because of sample consolidation, but still remain on-staff
- However, our funding is project based ...

Cumulative Project Level New Hire Attrition Rate by Month from Project Assignment

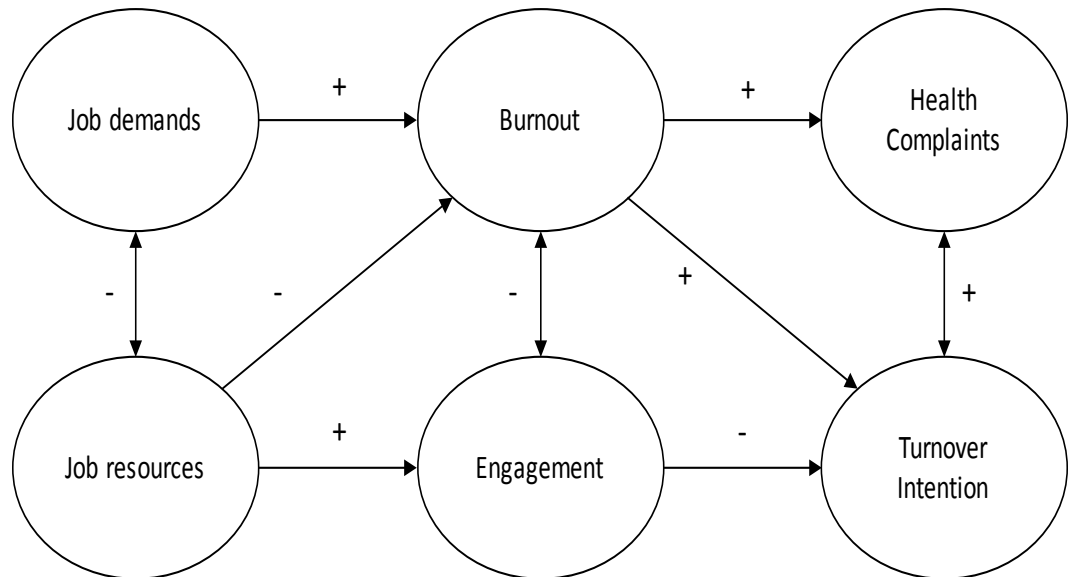


The Objective

- Calculate the project-based cost of reducing attrition by to have one less new hire
- Cost factors include:
 - Hiring costs
 - Attrition costs
 - On-boarding costs
- Benefits include
 - Efficiency
 - Quality

Causes of Attrition

- Job Demands-Resources (JD-R) model, from Korunka et. al. 2009, p. 244
 - Lack of job resources
 - Burnout
 - Lack of engagement
 - Health complaints



Initiatives at SRC

- Lack of job resources
 - Supervisory support / appreciation packages
 - Access to self-training modules
- Burnout
 - Annual 'bonus' to allow interviewers to take time off
 - Track likelihood to attrit and reduce or modify workload
- Lack of engagement
 - Better interviewer screening process
 - Post-training appreciation
- Health complaints
 - Safety in the field
 - Health coverage

Next?

- Proof is in the pudding
- Project and center level attrition levels to be tracked

Management challenges associated with staffing the survey lifecycle

Deborah Bittner
Director, Survey Research Center
Social & Scientific Systems, Inc.

Setting the Stage for the Study Team

- Know your study team (design, programming, operations, etc.)
- Set expectations among team members
- Establish the potential of the shared project and implications for future work
- Identify team intersections, potential issues, logjams, sources of frustration
- Create pathways for resolving issues before the project begins

Train and Mentor Staff

- Make clear the individual's role in the process and how their unit fits into the project team
- To the extent feasible, train for specific tasks rather than multiple
- Reference specific project problems; address individual barriers to success
- Consider skill sets when assigning roles
- Encourage a more holistic project view by advancing the team's understanding of unit intersections

Course Corrections

- Debrief staff periodically – don't save lessons learned until the end
- Listen, listen, listen – seek staff input early for resolving emerging problems
- Credit innovations and problem solving to appropriate staff – take advantage of organizational award programs
- Vet potential study adjustments with all units to minimize unintended consequences (scenario testing)
- Once study adjustments have been determined, negotiate implementation with impacted areas
- Make sure that all staff understand the reasons for and anticipated results of the adjustment

Opportunities

- Consider that many view their entire organization through the prism of their main project
- Encourage the development of new skills among team members (e.g., liaison role between units)
- Support staff exposure to greater supervisory and management challenges

Building a Talent Magnate



For

FedCASIC Management Challenges Workshop: Staffing the Survey Lifecycle

April 12, 2017 | Washington, DC

By

Debra Coaxum, Director for Oil, Gas, and Coal Supply Statistics

Energy Information Administration – Department of Energy

ABOUT

About EIA

Our Work

- Mission & Overview
- Product & Service
- Customer & Stakeholder Engagement
- Accomplishments
- For previous years

EIA News and Information

Our Organization

Budget, Plans and Reports

Our History

EIA Conference

Petroleum & Other Liquids

Crude oil, gasoline, heating oil, diesel, propane, and other liquids including biofuels and natural gas liquids.

Natural Gas

Exploration and reserves, storage, imports and exports, production, prices, sales.

Electricity

Sales, revenue and prices, power plants, fuel use, stocks, generation, trade, demand & emissions.

Consumption & Efficiency

Energy use in homes, commercial buildings, manufacturing, and transportation.

Coal

Reserves, production, prices, employment and productivity, distribution, stocks, imports and exports.

Renewable & Alternative Fuels

Includes hydropower, solar, wind, geothermal, biomass and ethanol.

Nuclear & Uranium

Uranium fuel, nuclear reactors, generation, spent fuel.

Total Energy

Comprehensive data summaries, comparisons, analysis, and projections integrated across all energy sources.

Highlights

[This Week in Petroleum](#) ▾

[Weekly Petroleum Status Report](#) ▾

[Weekly Natural Gas Storage Report](#) ▾

[Natural Gas Weekly Update](#) ▾

[Electric Power Monthly](#) ▾

[Quarterly Coal Report](#) ▾

[Monthly Energy Review](#) ▾

[Residential Energy Consumption Survey 2009](#) ▾

[Electricity Data Browser](#) ▾

Weekly Products

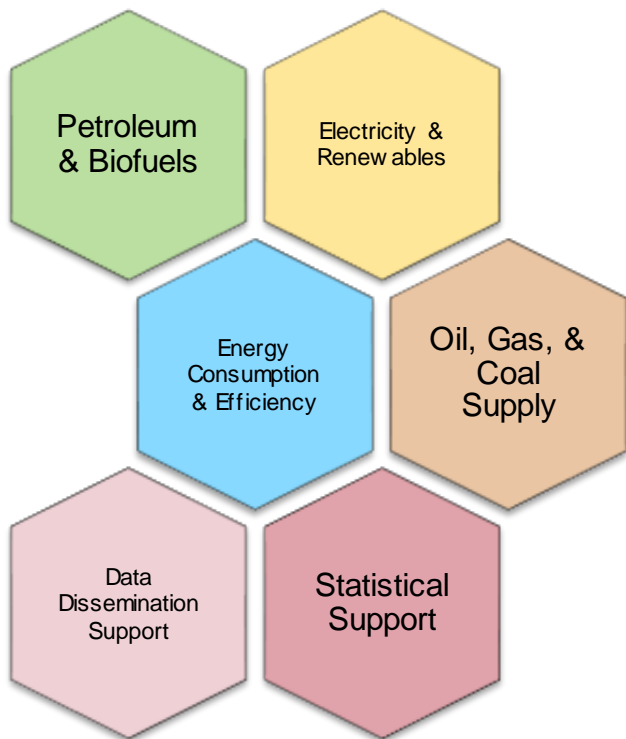
- [Weekly Natural Gas Storage Report](#) (principal Federal economic indicator)
- [This Week in Petroleum](#)
- [Natural Gas Weekly Update](#)
- [Weekly Coal Production Report](#)
- [Weekly Petroleum Status Report](#)
- [Gasoline and Diesel Fuel Update](#)



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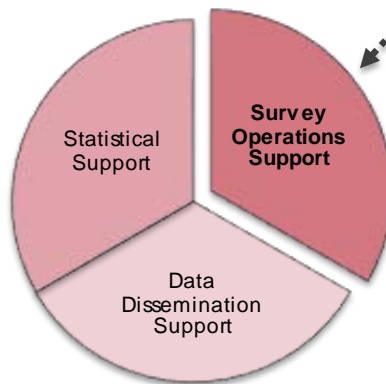
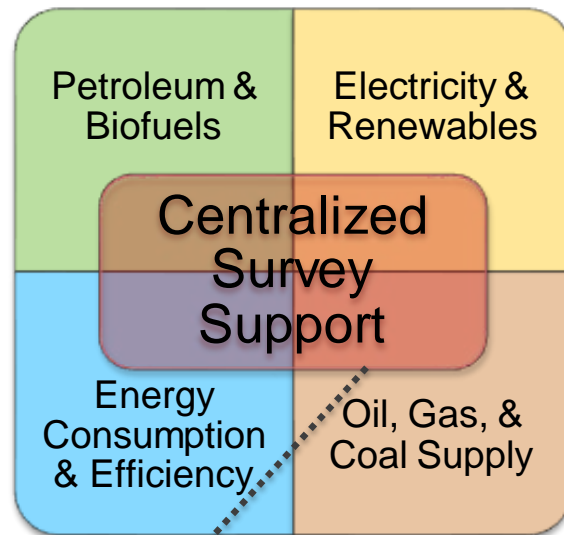
EIA Survey Program

'Old' paradigm:



- Independent, "silo'd" processes
- Inconsistent implementations / methodology
- Duplication of effort

'New' paradigm:



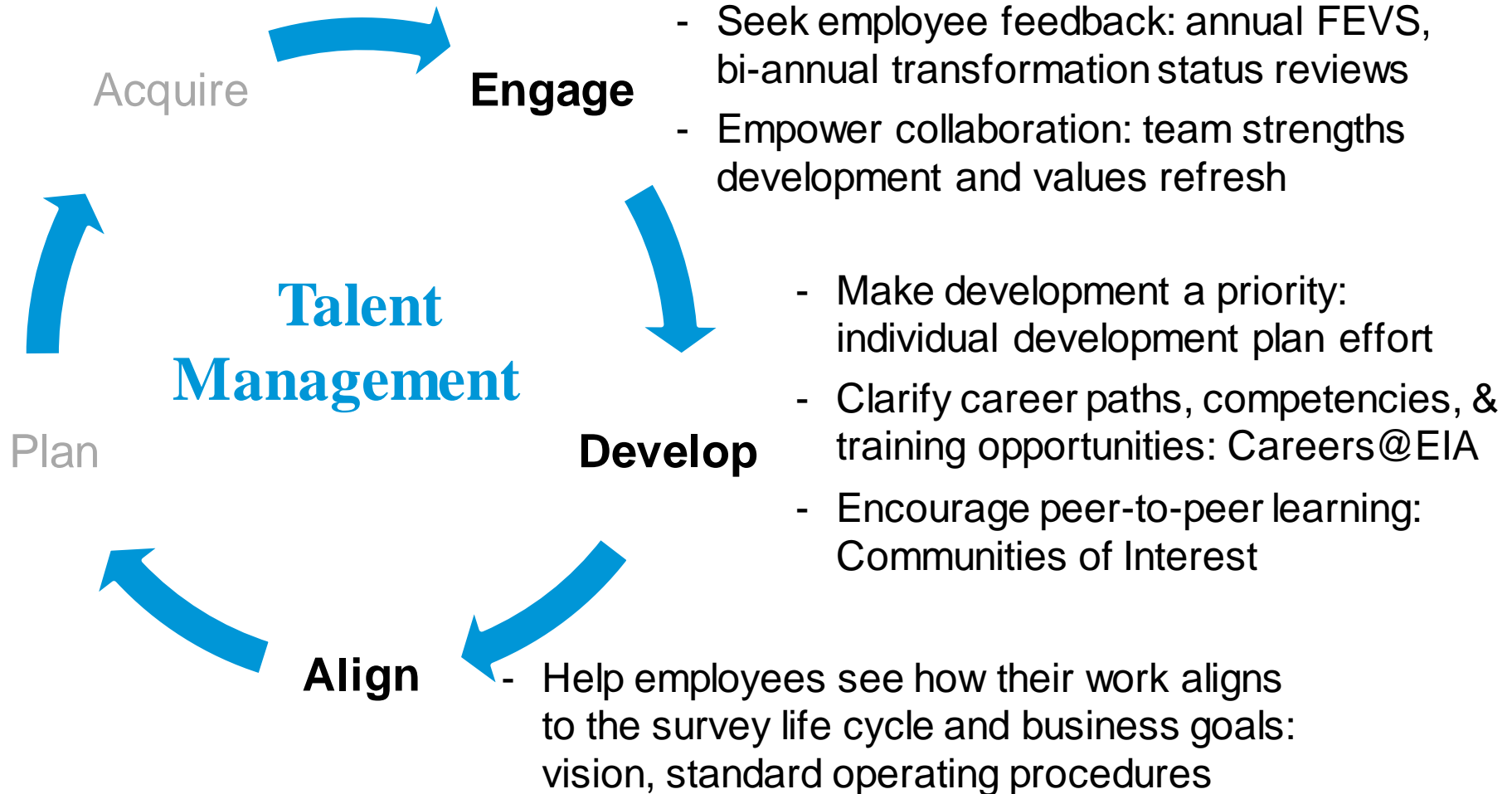
Integrated, standardized approach to:

- Operational procedures
- Frame maintenance
- Data collection
- Data processing
- Customer service mgmt.
- Statistical methods
- Data dissemination
- Project management

“ “ What if we build it and they (employees) don't come?”



Current Focus: Create a Talent Magnate



Management challenges associated with staffing the survey lifecycle

Kyle Fennell
NORC

Managing generational change

- We have seen a number of retirements/departures of key staff in recent years.
- Since we benefit from having an experienced workforce, we expect this to continue
- The challenge – Keeping ahead of this change given pressures of the data collection cycle, the decentralized nature of the work we do, and evolving data collection landscape.

Finding, keeping, and replacing qualified interviewers

- Attracting qualified applicants
 - Major metropolitan areas
 - Rural locations
- Avoiding early attrition
- Filling gaps in coverage created by early departures

Keeping managers engaged

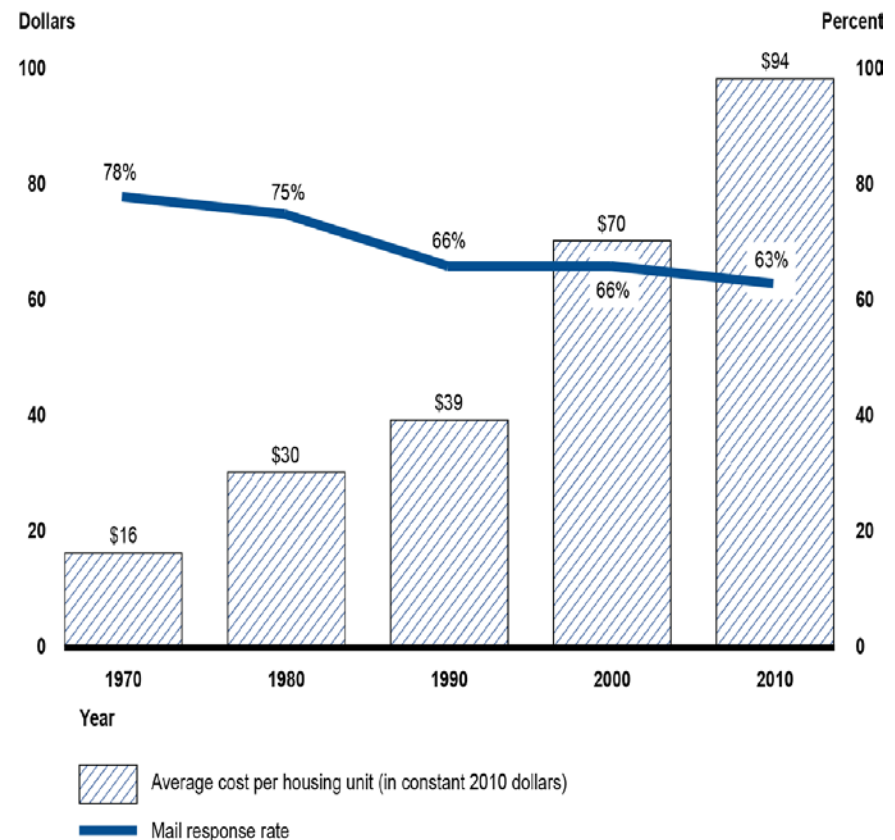
- Training opportunities (in house and externally focused)
- Chances to shape policies/procedures
- Visibility for and recognition of staff contributions and ideas

Management challenges associated with staffing the survey lifecycle

Joshua Keller
Strategic Workforce Planning
Program Manager
US Census Bureau

Changing data and data collection landscape that sees:

- Declining survey response rates & increasing costs
- Demands for more timely, relevant, and local/sector information



Source: GAO analysis of Census Bureau data. | GAO-15-546T

Changing data and data collection landscape that sees:

- New/competing products from non-statistical sources
- New computing techniques require improved approaches to respondent/provider confidentiality protection
- Advent of responsive design techniques, “Big Data” sources, administrative records, and increasingly accurate models
 - Research underway in all these areas to address challenges

Questions and Challenges we are addressing...

- What is the future workforce profile at Census as business processes change and data collection methods evolve?
- What are the changing competency and skills sets that Census needs to complete the work of tomorrow?
- How do we innovate and transform methods, processes and the workforce while still meeting current production levels with limited budgets?
- How do we inform, scope, and align our enterprise-level human capital activities to support the future state?
 - Training
 - Hiring
 - Recruiting
 - Retention



Creating a Transformation Workforce Model

Hypothesis: underlying structure common to all transformations that involve changing business processes through four phases (if new product or capability no “as is”)

As-Is

- Document current business processes
- Assess current workforce counts, grades, occupations
- Identify current competencies and skills and gaps

Innovation

- Data identification, acquisition and prototype
- Document new and emerging roles
- Create preliminary new processes (To-Be)

Transition

- Shift operations from As-Is to To-Be
- Balance between As-Is and To-Be to meet production needs
- Hire and train as needed to prepare for steady state

Steady-State

- Optimize workforce
- Interject innovation as needed to address emerging techniques
- Retrain as needed to keep up with emerging techniques

Test Hypothesis: Develop To-Be processes and validate competencies through multiple use cases in different phases of transformation

Management Challenges Associated with Staffing the Survey Lifecycle

Chris Manning

Program Manager

Current Employment Statistics

US Bureau of Labor Statistics

FEDCASIC

April 2017

Talent Recruiting Challenges

- Recruiting Decisions
 - ▶ Skills needed → Occupation
 - ▶ Federal / Contract?
 - ▶ Entry level / Experienced?
- Challenges
 - ▶ Time to get a “cert” / task order
 - ▶ Competitive salary?
- Sell the Mission!

Talent Development Challenges

■ OJT

- ▶ IDP (Individual development plan)
- ▶ Planned work → new skills / competencies

■ Frequent assessments

- ▶ Reinforce good performance
- ▶ Collaborating with employee to identify and develop selected skills

Formal Training Challenges

- Tightened budgets – less funding for formal training
- Alternatives
- Morale



Talent Retention

- Salary? Flexibility limited.
- Mission critical work!
- Succession Planning
 - ▶ Dispersion of capabilities / critical tasks
 - ▶ Short- and Long-term planning
 - Production/development
 - Planning for new/future skills needs
 - Supervision/management
 - ▶ Challenging with smaller staff sizes



Discussion