

# Using diversity, equity and inclusion to drive outcomes at CareerStaff unlimited

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## Summary paragraph

In early 2018, Kate McKinnon, AVP of human resources (HR) for CareerStaff Unlimited (CSU), a temporary staffing company and division of Genesis HealthCare, reflected on the late 2016 decision to develop women for leadership roles at the company. With a rather unconventional implementation of the Women's Leadership Group (WLG), Kate successfully developed fifteen female individual contributors, many of whom were promoted to leadership roles by early 2018. Kate was concerned about maintaining the momentum necessary to continue (and expand) the program of identifying, developing, promoting and retaining women and other diverse employees across the company. She also wanted to measure a clear correlation between the WLG and CSU's financial and customer outcomes. It was time to plan phase two of the program, including further improvement of the diversity, equity and inclusion (DE&I) efforts at CSU.

## About CareerStaff

CSU is a leader in the delivery of workforce solutions for the healthcare industry. Their mission is to connect healthcare organizations with talented healthcare professionals to ensure delivery of exceptional patient care. They fulfill their mission by leveraging a national network of 6 brands and more than 25 offices throughout the USA. CareerStaff's services include travel and per diem employment opportunities for nurses, therapists and pharmacists. By offering unrivaled customer service, unique placement opportunities, top pay and benefits and employment that meets the lifestyle requirements of clinicians, CareerStaff attracts high-quality clinicians who transition well to new environments and rapidly assimilate into facility teams.

## Genesis acquires sun

In 2012, Genesis Healthcare (GHC) acquired Sun Healthcare (CSU's parent company). This was widely heralded as a highly successful M&A activity for skilled nursing and rehabilitative services; the new company was now a coast-to-coast operation with approximately 75,000 employees in more than 400 direct sites of service in 29 states. It had also expanded Genesis HealthCare's rehabilitation therapy business to more than 1,500 contracts in 46 states. This created one of the largest skilled nursing providers in the country and generated roughly \$4bn in revenue. However, CSU had an inauspicious beginning at GHC. CSU was known as a "stepchild" of Sun, and it was not helping its case for viability with both market share and EBITDA trending downward.

CSU had previously played a critical role in the valuable service of providing temporary nurses, therapists, doctors and other healthcare-related employees to its parent company

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(Sun) and also to paying third parties. At one time in the 2000s, CSU was a top-five temporary staffing firm in the healthcare space, but that market share distinction quickly eroded as Sun's financial position changed with reductions in federal and state reimbursement for Medicare and Medicaid Services. GHC had explored the possibility of starting a temporary employment service as far back as 2008, given the vast number of nurse and therapy candidates that the recruiting team courted. This clinician subset rebuffed full- and part-time recruiting offers because they preferred flexibility and a negotiated hourly rate over stability and constancy of employment.

### **Support of CareerStaff Unlimited**

CSU's president reported directly to GHC's CEO. CSU was quickly branded as "not part of core operations within GHC" and was instructed to reduce expenses, improve EBITDA, and get ready to be sold. HR support of CSU was purely transactional – "keeping the lights on" and mitigating risk were paramount. The employee base was bifurcated between temporary employees (90% of the workforce) and support staff (10%). Staff employees were responsible for the recruitment, credentialing, payroll, and other basic transactional activities of CSU's product – i.e. temporary employees placed within Sun or at a CSU client for profit.

### **The change in leadership**

During 2013, the president of CSU left the company and was replaced by one of the existing internal VPs. He reported to the SVP of Talent Acquisition and Leadership Development (Mike), who had joined GHC in 2007. Mike had taken a recruiting function from disorganized, distrusted, and not very effective to the top Talent Acquisition Department in the Philadelphia area in roughly five years. He also introduced performance management, new manager training and pre-hire leadership assessments to all of GHC. Mike decided it was time to integrate CSU's capabilities into the temporary placement needs of GHC and also to take the HR capabilities of CSU into the twenty-first century.

### **The critical meeting in 2013**

CSU faced many challenges in 2013 – they had been acquired by GHC in 2012; their market share, revenue, and EBITDA were in decline; and again there were rumblings and rumors of being sold by their new parent company. After many years of double-digit growth, without much oversight from their prior parent company, CSU management was asked for a revised plan for revenue and profitability growth. They were not used to this level of scrutiny. After running a strategy session with all top-level leaders at CSU and developing a SWOT analysis, an aligned strategy map and balanced scorecard, Mike saw that the lack of a productive and motivated human capital in staff positions was a huge exposure point. Even if CSU needed to reduce expenses to improve EBITDA, there was still an opportunity to improve human capital. It was just a matter of time and collective will to execute the strategies during the formulation of the strategy map and balanced scorecard. The new leader of CSU tasked each VP to develop initiatives to support CSU's revised (and aligned) goals heading into 2014. See [Appendices 1](#) (SWOT), [2](#) (strategy map) and [3](#) (balanced scorecard). It was time for Mike to hire someone to lead HR for CSU and change the HR function from transactional to transformational.

### **Human resource as leader**

In 2014, Mike hired Kate McKinnon as Director of HR for CSU. Kate had been introduced to Mike a year before, and her resume detailed her many accomplishments, including a

Master's Degree in Leadership Development along with extensive Training and Development experience in a corporate setting. (Note: although not a learning objective for this case, hiring Kate for her cognitive, behavioral and motivational fit for this job, along with a connection to healthcare in her past, should exemplify why hiring someone without direct knowledge or skill for a particular job can work out extremely well, if they are motivated and willing to learn the job skills over time).

Kate's primary role was HR Business Partner, which spanned a variety of responsibilities including Employee Relations. As Kate learned that part of the role, some significant action items occurred at CSU as a result of projects that emanated from the strategy map and the goals being measured on the balanced scorecard. Adherence to a new performance management system caused consternation among staff members, who had never really been held accountable for measurable goals. The resultant uptick in employee relations issues pushed Kate to a place she had not previously experienced. However, she learned (partnering with Mike and in-house counsel when she was unsure) and provided guidance to branch office leaders. Kate's willingness to collaborate as an HR partner was a new experience for the branch office leaders. She also started to see the effects of bad leadership in the field and knew CSU had to do something about it if the utilization of human capital was to be the backbone of achieving the company's newly communicated operational, customer and financial outcomes.

## Leadership dilemma

In late 2014, CSU started succession management sessions to include any leader who managed even one direct report. Training had been available for new leaders via GHC's program (including topics such as recruiting, performance management, coaching and employee and legal relations best practices). Kate administered a new, objective assessment tool (Profiles International XT or PXT as it was often known) to all leaders in the company.

The PXT was developed by assessing the cognitive, behavioral and occupational traits of all staff in similar positions, determining what the top performers exhibited in these three areas and comparing all employees to the top performers. This was subsequently used as a succession management tool, along with objective performance data and each leader's subjective performance review score (Scale 1–5). Every leader's manager was then asked to calibrate their staff against other similar leaders, this data in front of them and the senior leadership team present to arbitrate and calibrate. Most important, this process, although started with assistance from Mike, was ultimately fully managed by Kate.

Kate was able to provide a unique perspective on most, if not all of these leaders, as she had been dealing with the fallout of some of their leadership deficiencies for more than a year. The calibration sessions provided the basis for extra development of the high potentials (HIPOs) and development plans for low performers to improve or leave CSU. The sessions also clearly identified holes where no likely successor was in place; therefore, plans for external hiring were developed.

At the hub of all of these leadership assessments, development activities, promotion and dismissal recommendations, Kate could see the whole picture and knew CSU had miles to go to fully optimize its human capital. Further, Kate could see clearly that all senior positions at CSU were occupied by males, with the only two exceptions being herself and the CFO. Why would an industry dominated by a female workforce (both internal and external employees) not have more female leadership in senior operations and sales roles? Why were the only two females in senior leadership at CSU in staff roles? Kate knew something needed to be done about it, no matter how risky the effort might be.

## Change is inevitable

In early 2015, GHC announced that effective February 2, 2015, it had completed its previously announced combination with Skilled Healthcare Group, Inc. The combination of the two companies created one of the largest post-acute care providers in the country, with more than 500 skilled nursing centers in 34 states. It also expanded GHC's rehabilitation therapy business, Genesis Rehab Services, to more than 1,600 service locations in 46 states and the District of Columbia. The combined company began trading on the NYSE with a new ticker symbol of GEN.

Mike was asked to lead HR for the biggest division of GHC. This included engagement, retention, and employee and labor relations for approximately 40k employees, primarily on the skilled nursing side of GHC. Mike was still managing CSU, with the interim president of CSU and Kate reporting directly to him. At roughly the same time, Kate was nominated and selected to attend KPMG's Executive Leadership Institute for Women (ELIW). It was established in 2009 to provide a unique leadership training program for the firm's future women leaders. KPMG's Network of Women (KNOW) created ELIW. It launched in its Philadelphia office with the goal of further developing senior women, as well as women from outside KPMG. ELIW provides opportunities for women to expand skills and initiate career-enriching relationships with executive women representing corporations in their local market. This year-long development program changed Kate forever. She was determined to take what she learned and apply those concepts to the women at CSU, with a special emphasis on those who desired to be leaders at the company. The timing was perfect, as CSU was being readied for a significant organizational change and preparing a new group of leaders for the next level of responsibility was a major objective for the company. It was time for Kate (armed with new leadership skills acquired at ELIW) to be bold and create a special venue for women in CSU to develop and be noticed.

## A year of transition

In early 2016 several third parties expressed interest in the purchase of CSU. GHC explored these opportunities but ultimately determined that the company was viable and increasingly profitable (revenue at year-end 2015 was up 2% from 2014 and EBITDA was up 4%). Steve, an industry veteran of temporary staffing agencies, was named CSU president. Kate reported directly to Steve. Shortly thereafter (mid-2016), Mike left GHC to pursue a full-time assistant professor role at Temple University, leaving Kate to wonder about her future. Kate thought it was time to put her stamp on CSU's human capital capability and potential. She decided to apply her development as part of ELIW and reimagine the CSU workforce, especially for women who made up the bulk of staff roles. This was a critical step for CSU's diversity, equity and inclusion efforts but did not immediately impact women aspiring to leadership roles. On August 17, 2018, Kathy Gurchiek in an SHRM Magazine article, "Managers Play Significant Role in Creating Diverse Teams," reported that women and nonwhite managers "are uniquely positioned to serve as change agents" and help companies find other talented, diverse workers.

## Data speaks to action

In 2017, Kate reviewed the 2016 employee engagement results. Although the potential sale of CSU seemed to finally be behind them, there were still many challenges to overcome for CSU. Not surprisingly, engagement scores were flat; and given the well-researched correlation between engagement and productivity and turnover, it was time to review the data and develop action plans to address the staff's concerns. The two areas that jumped out at Kate were:

- Lack of diversity at senior level (Agreed or Strongly Agreed/2015 – 90% vs 2016 – 60%).

- Not enough communication from senior leadership to the field (Agreed or Strongly Agreed/2015 – 84% vs 2016 – 66%).

Armed with this engagement data, Kate started a CSU Women's Leadership Group (WLG) and a monthly Women's Leadership Call (WLC). It began with 15 participants who met monthly to talk about issues facing women at CSU and to understand and learn from Kate how to succeed as a woman in a male-dominated environment. These initial participants had access to Kate more than others and the conversations were confidential unless they had to be reported for legal reasons. Participants were nominated by their managers. The goal was to work with HIPO women, so Kate asked managers to select those individuals to participate. Once she had the group (that grew to 39 by the end of 2017), the participants suggested and ranked topics. Kate created a monthly schedule of topics and presented on a new topic every month ([Appendix 4](#)). If participants wanted to work with Kate to facilitate the call, she included them on the presentation and they worked through the topics together. A mentoring program was one of the more popular outcomes of the Women's Leadership Calls ([Appendix 5](#)). Note: the original (nominated) participants (2017 calls) were 39. Out of those participants, 10 were promoted to a management role and 5 changed roles within CSU.

Senior leadership immediately responded positively when the WLC idea was first proposed. Kate explained her reason for holding the calls and how the idea was driven by her experience with the KPMG group. She wanted to ensure that the men on the senior leadership team did not feel excluded, so she invited them to join as well (a bold, but inclusive, move indeed). The goal of the first presentation was to provide the women with background about the necessity of the calls, Kate's experience with KPMG, some history of the psychology of male/female differences in childhood and how they may impact the work environment, and some common misconceptions about women in leadership. Kate asked one of the male VPs to attend the call and provide his opinion of why the calls would benefit HIPO women at CSU. The first call received mixed reviews from participants. Most of the women who attended were excited and provided great positive feedback. However, two women were angry. They felt that women did not have obstacles to overcome in the workplace and had the same opportunities afforded to men. They thought Kate was "women bashing" by bringing up misconceptions about women in leadership and that it was inappropriate to have a man on the first call. Kate had a long discussion with both women to try to understand their perspective. Both were successful college athletes, raised to believe that they could do everything that men could do. They were both early in their working careers and had never felt disadvantaged by their gender. Ultimately, they both became advocates for the program, and one of them was recently promoted to Kate's team. By year's end, the WLG and WLC were deemed smashing successes by Steve and Kate. The proof would come with the next engagement survey.

### **What's next for 2018 and beyond?**

At the end of 2017, Kate sent out another survey to determine the perceived success of the calls and asked for suggestions going forward. An overwhelming number of women asked to have less formal presentation calls and an open format to discuss common issues and/or subjects that were important to them. This dovetailed with the results of the 2017 Engagement survey ([Appendix 6](#)). In 2018, these suggestions were implemented, and now we have a woman give her story (personal/professional/obstacles/wins, etc.) and facilitate a Q&A session after her presentation. Kate decided that the success of the WLG could be expanded to even more women at CSU; there are now 66 participants, and that number is expected to grow. Most important, many of the original 39 have been promoted. Of those added in 2018, 16 additional women have been promoted and 1 changed roles within CSU.

Overall retention (and retention of women, including HIPO women), is up from prior years. First-year turnover (overall) was down to under 15% in 2018 from an all-time high of 47% just two years before. Revenue has been growing by 5%–7% per year since 2016 (and on pace to improve again in 2018). EBITDA was growing by 4%–5% since 2016, and in July 2018, the independent analysts at Great Place to Work® certified that CareerStaff Unlimited was a Great Place to Work® (Appendix 7). CSU was to survey their employees with the 2018 Employee Engagement Survey in November 2018, and improvement in the areas of DE&I and communication were watched with great anticipation.

At face value, the WLG program is an absolute success. Note this email received from a relatively new female employee, who is in an individual contributor role:

“I had the opportunity to sit in on the Women’s Leadership call last week. I wanted to reach out to express how much I appreciate this idea! Creating a safe place for women to share stories and concerns provides so much comfort, not to mention the opportunity to hear from leaders within the company that we may not speak to day-to-day. I loved seeing and hearing women supporting each other and recognizing each other’s strengths. I was wondering if I could continue to sit in on these calls moving forward. Please let me know 😊”

Despite this type of support for the program, Kate was concerned about a few things moving forward.

- First, how should she effectively expand CSU’s DE&I initiatives to include ethnicity, generational differences, and other visible and invisible differences?
- Second, how should she measure the success of the WLG program more objectively? Are there metrics she can use or develop to measure success?
- Finally, how should she ensure that these valuable WLG resources stay and grow with CSU?

Never one to back down from a challenge, Kate was ready to expand and improve on what she has already accomplished. What would you suggest she do?

## Appendix 1. CSU SWOT

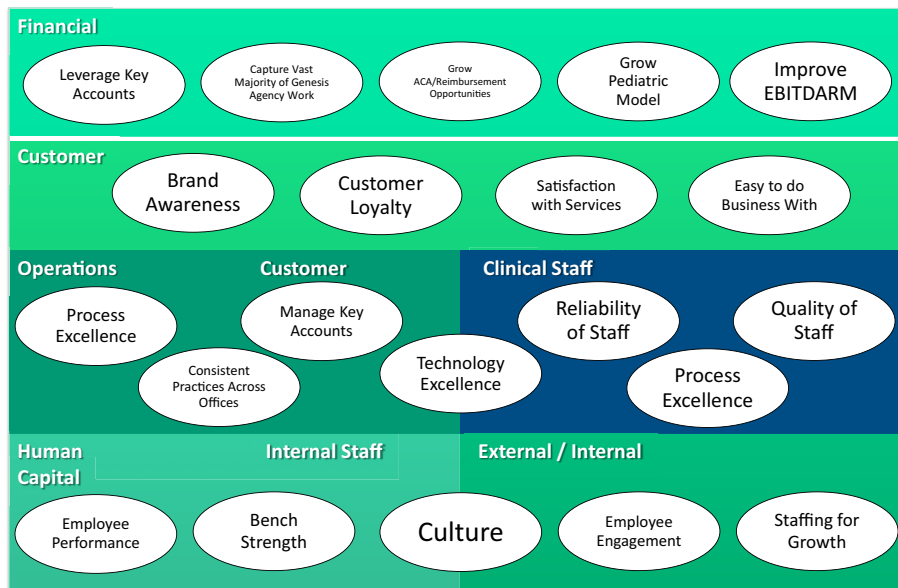
### SWOT ANALYSIS

CareerStaff Unlimited

<b>S</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>•Strong Bond</li> <li>•Tenure of Staff/ Management</li> <li>•Local Market(s) Presence</li> <li>•Strong Benefits Package</li> <li>•Diversity of Services Within Each Brand</li> <li>•Genesis Backing &amp; Alignment</li> </ul>	<b>W</b>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>•Siloed Service Offerings</li> <li>•Lack of Centralization for Support Services (Mktg, HR, Advertising ect)</li> <li>•Inconsistent Branch Structure (Training, Size of Branch etc.)</li> <li>•Lack of Key Accounts &amp; Account Mgt</li> <li>•Technology!!!</li> <li>•Lack of Targeted Growth</li> </ul>
<b>O</b>	<b>Opportunities</b> <ul style="list-style-type: none"> <li>•Cross Sell Services</li> <li>•VMS/MSP</li> <li>•Organic/ Acquisition Growth</li> <li>•Talent Management</li> <li>•Leverage Genesis Relationships</li> <li>•Leverage Existing Brands with Key Accounts</li> </ul>	<b>T</b>	<b>Threats</b> <ul style="list-style-type: none"> <li>•ACA</li> <li>•VMS/ MSP (Other Companies)</li> <li>•Regulations/ Compliance</li> <li>•Decline in SNF &amp; Acute</li> <li>•Employee Skillset / Competency Mismatch</li> <li>•Lack of Process/ Quality Control</li> </ul>

## Appendix 2. CSU Strategy Map

**Vision:** Leverage CareerStaff Unlimited Brands to become a Top 10 Healthcare Staffing Provider (including Genesis HealthCare) by December 2016.



# Appendix 3. CSU Balanced Scorecard

**CareerStaff Unlimited  
Balanced Scorecard — Financial Metrics  
2014 to 2016**

Financial Metrics		Measures	Targets	Supporting Initiatives	Q4 2014	2014 Overall	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Annual
Financial Objective Type	Measures	Targets	Supporting Initiatives	Q4 2014	2014 Overall	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Annual	
Leverage Key Accounts	Increase in revenue for key accounts	TBD	Reasons in Q4: Average for 2014. Increase is calculated per qtr to baseline	86%	85%	123.22%	156.66%	105.75%	109.03%	123.87%	
Capture vast majority of Genesis/Formation Agency	% of Business from GRS	TBD	% of GRS business staffed by CSU	11%	12%	10.00%	23.10%	22.40%	16.80%	18.88%	
Capture vast majority of Genesis/Formation Agency	% of Business from GRC	TBD	% of GRC business staffed by CSU	63%	53%	72.10%	65.50%	68.90%	72.70%	69.80%	
Grow ACA/Reimbursement Opportunities	% of Business from Home Health	TBD	Use % from Payor Source report for qtr	6.81%	7.72%	6.00%	6.08%	6.31%	5.46%	5.96%	
Grow ACA/Reimbursement Opportunities	% of Business from MSP	TBD	Look at 67750 revenue compared to total company	9.81%	5.48%	9.94%	12.58%	19.54%	19.64%	19.43%	
Grow Pediatric Model	% of Business from Schools	TBD	Use % from Payor Source report for qtr	28%	27%	29.27%	25.16%	14.49%	25.07%	23.82%	
Improve EBITDARM	% increase over budget	TBD		-27%	-12%	3.11%	16.99%	-2.57%	-17.62%	-0.02%	
Improve EBITDARM	% increase over prior year	TBD		-20%	5%	13.17%	16.05%	0.76%	22.51%	13.12%	

**CareerStaff Unlimited  
Balanced Scorecard — Customer Metrics  
2014 to 2016**

Customer Metrics		Measures	Targets	Supporting Initiatives	Q4 2014	2014 Overall	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Annual
Customer Objective Type	Measures	Targets	Supporting Initiatives	Q4 2014	2014 Overall	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Annual	
Brand Awareness	Identify Multi-Brand Accounts	10	Cross branding in office locations and involvement from National Sales team.	0.2	0.2	40%	55%	65%	65%	60%	
Brand Awareness	Increase in Website traffic	10%	Redesign of websites, Google Analytics, Online Applications, Uniform marketing material.	NA	NA	2%	4%	5%	10%	10%	
Customer Loyalty	Revenue Growth of Key Accounts	5%	Staffing focus and recruiting support from National Recruitment.	NA	NA	1%	2%	3%	5%	5%	
Customer Loyalty	New MSP Clients	3	National Sales and MSP teams collaboration.	NA	NA	33%	33%	66%	100%	100%	
Satisfaction with Services	Client Survey	65%	Office support to contact their customers to complete survey. Improve ratings in each Quarter.	0.2	0.2	NA	40%	65%	20%	60%	

**CareerStaff Unlimited  
Balanced Scorecard — Operations Metrics  
2014 to 2016**

Business Process Metrics		Measures	Targets	Supporting Initiatives	Q4 2014	2014 Overall	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Annual
Operations Objective Type	Measures	Targets	Supporting Initiatives	Q4 2014	2014 Overall	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Annual	
Customer - Process Excellence	Centralized Sales Person	1 person by Q1	Sales Team for company to support growth in National, Key, and MSP Accounts	NA	NA	100%				100%	
Customer - Process Excellence	School Person	1 employee by Q2	National Recruitment Team to support recruitment for school positions across the country	NA	NA		100%			100%	
Customer - Process Excellence	Sales Process	1 Program	Sales Process from initial contact with client to handoff with who will be primarily staffing them	NA	NA	100%				100%	
Consistent Practices Across Offices	Standardize processes in offices	50% of offices done by Q4	Operational Reviews for offices by Q4	90%	90%		95%	100%	100%	100%	
Technology Excellence	Electronic Signatures	90% utilization by offices	DocuSign	20%	20%	20%	40%	70%	85%	88%	
Technology Excellence	Sales Cycle development and tracking	1 100% contracts uploaded for new leads	CRM	15%	15%	25%	25%	60%	62%	62%	
Technology Excellence	Productivity Management Tracking for offices and the 40X program	100% utilization	Pushpin Mouth	40%	40%	45%	50%	75%	60%	60%	
Reliability of Staff	Scheduling	Completed by Q2 (internal process) Q4 (external process)	Training Process Procedure for both internal and external employees	NA	NA	NA	90%	95%	100%	100%	
Quality of Staff	Hiring Process	Completed by Q1	Interview Process	NA	NA	100%				100%	

**CareerStaff Unlimited  
Balanced Scorecard — Human Capital Metrics  
2014 to 2016**

Human Capital Metrics		Measures	Targets	Supporting Initiatives	Q4 2014	2014 Overall	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Annual
HR Objective Type	Measures	Targets	Supporting Initiatives	Q4 2014	2014 Overall	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Annual	
Internal - Employee Performance and role expectations for each role	Less employees on PIP; reduction in 90 day turnover	Less than 5% of employees on PIP by Q4	PIP completed for all new hires; onboarding program; new hire through 90-day PIP touch points	NA	NA	NA	PIP completed for 90% of new hires (NA)	PIP completed for 90% of new hires (NA)	PIP completed for 90% of new hires (NA)	PIP completed for 100% of new hires (NA)	
Internal - Bench Strength	Ratio of Internal Promotions to External Hires	1:1 Ratio of Internal Promotions to External Hires	PIP Implementation and B report; Monthly Program Monthly email to highlight internal job postings; Interview to highlight internal promotions; search assignments for current employees	100% Senior positions (VPA, NO, AD)	100% Senior positions (VPA, NO, AD)	100% PIP completion for 50 and above; Senior began sending out internal job postings; Monthly promotion began including promotion, recognition, new location and current employee information	100% PIP completion for 50 and above	100% PIP completion for 50 and above	100% PIP completion for 50 and above	100% PIP completion for 50 and above	
Culture	Compliance in Leadership Essentials training for all managers of people	100% Completion of Leadership Essentials training and participation in monthly report call	HRMT 100 Leadership Essentials being presented in monthly report call	NA	NA	100% Course completion; 100% full attendance	100% Course completion; 100% full attendance	100% Course completion; 100% full attendance	100% Course completion; 100% full attendance	100% Course completion; 100% full attendance	
Culture	Employee Recognition	Employee Recognition/Reward Program by end of Q2	Development of Employee Recognition and Reward Program	NA	NA	NA	Implementation of Recognition Program tool	100% use of Recognition Program tool	100% use of Recognition Program tool	100% use of Recognition Program tool	
Internal - Staffing for Growth	Employee Retention	Reduction in yearly turnover; voluntary turnover; staff provided positive for internal candidate	Creation of Onboarding Program	NA	NA	Create onboarding / orientation program	Implementation of onboarding / orientation program with 100% regular use for all new hires; 100% use of onboarding / orientation program	100% regular use for all new hires; 100% use of onboarding / orientation program	100% regular use for all new hires; 100% use of onboarding / orientation program	100% regular use for all new hires; 100% use of onboarding / orientation program	

## Appendix 4. CSU 2016 Women’s Leadership Calls Topics

2016 Schedule of Calls:

- Taking Charge of Your Career Growth and Development
- Successful Transition to a Leadership Role
- Work/Life Balance and Leadership
- Leading Others of the Same Age and/or Same Tenure in the Company
- Voicing Your Opinion in a Constructive Way
- Leadership Styles/Strategies
- Personal Branding
- Inspiring the Next Generation of Women/Developing Women Leaders
- Emotional Intelligence in Women
- Confidence
- How to Motivate Your Employees
- Getting Work Done Through Others/Delegation

## Appendix 5. CSU Mentor Program

Hi everyone!

As most (if not all) of you know, we started our CSU Women’s Leadership Group with the women you nominated and just had our first monthly call. One of the topics that came up several times was the importance of mentors. I would love to get some volunteers (male or female) who would be interested in mentoring some of the women on our calls. Please let me know if this is something you would like to do, and I’ll set you up with a mentee!



### COACH VS. MENTOR VS. SPONSOR

COACH	MENTOR	SPONSOR
Provides guidance for your development, often focused on soft skills (i.e. active listening), rather than technical skills	Informally or formally helps you navigate your career, providing guidance for career choices and decisions	Senior leader or other person who uses strong influence to help you obtain high-visibility assignments, promotions or jobs
Who drives the relationship? Both you and your coach are responsible for developing the relationship.	Who drives the relationship? You do. Your mentor is reactive and responsive to your needs.	Who drives the relationship? The sponsor does, advocating for you in many settings, including behind closed doors.
Actions: Provide development feedback outside the formal performance evaluation process	Actions: Help you determine possible career paths to meet specific career goals	Actions: Advocate for your advancement and champion your work and potential with other senior leaders

*A coach talks to you, a mentor talks with you, and a sponsor talks about you*

## Appendix 6. CSU 2017 Engagement Results



### Summary Key Findings

**CSU**

<p>More than three-fourths of employees participated in the survey process</p> <p><b>79%</b></p> <p>Celebrate increased response &amp; thank employees</p>	<p>Nearly two-thirds of employees are engaged</p> <p><b>62%</b></p> <p>Engage employees through enhanced communication &amp; change support</p>	<p>More than three out of four managers are highly effective</p> <p><b>83%</b></p> <p>Leverage managers to revitalize CSU's value proposition</p>
<p>Nearly three-fourths of employees see their location embracing the core values</p> <p><b>72%</b></p> <p>Opportunity to communicate a vision of the future that is more motivating</p>	<p>Less than a third of employees believe positive changes will occur as a result of the survey</p> <p><b>28%</b></p> <p>Communicate results &amp; next steps to employees; involve them in action planning</p>	

### Priorities

Engagement		Improve communications, ensure policies and procedures enable employees and provide the resources needed for employees to do their job effectively.
Employee Experiences		Increase support through change and take action on survey results. Ensure staff understand their career growth opportunities.
Workforce Personas		Focus on valuing employee voices and providing support and resources in order to improve employee attitudes.

## Appendix 7. CSU Great Places to Work Press Release



### FOR IMMEDIATE RELEASE

Media Contact:  
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### **CareerStaff Unlimited Named A Great Place to Work®**

Dallas, TX, July 2, 2018 – After an extensive review of its employees' experiences and company culture, CareerStaff Unlimited is thrilled to announce that the independent analysts at Great Place to Work® have certified that CareerStaff Unlimited is a Great Place to Work®.

With over thirty (30) years of experience in culture research and consulting, Great Place to Work® is one of the nation's most respected employee engagement organizations. Great Place to Work® conducted a comprehensive, anonymous Trust Index® survey of CareerStaff's employees. "According to our Trust Index®, 79 percent of CareerStaff Unlimited employees say it is a great workplace," says Sarah Lewis-Kulin, Vice President of Great Place to Work Certification. A summary of these ratings can be found at <http://reviews.greatplacetowork.com/careerstaff-unlimited>.

CareerStaff's Great Place to Work® survey results ranked the company's strengths and also includes employee feedback on areas of employee respect, employer fairness and company camaraderie. Over 167 CareerStaff Unlimited employees completed the Trust Index® survey resulting in a 90 percent statistical confidence level.

"We are thrilled to announce that our employees have named CareerStaff a Great Place to Work®," said Stephen Saville, President of CareerStaff. "A great workplace is one where you trust the people you work for, have pride in what you do, and enjoy the people with whom you work. Receiving this certification is completely attributable to the exceptionally talented individuals that we hire. We train our team members thoroughly and continuously provide them with ongoing professional development. By starting with top-grade talent and perpetually investing in their professional success, we are assured that our employees a significant differentiator for the Company.

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### **About CareerStaff Unlimited, LLC:**

CareerStaff Unlimited, LLC ("CareerStaff") is a leader in the delivery of workforce solutions and staffing services for the healthcare industry. Our mission is to connect healthcare organizations with talented healthcare professionals ensuring the delivery of exceptional patient care. We serve our mission by leveraging a national network of 6 brands and 25 offices throughout the United States. CareerStaff's services include travel and per diem employment opportunities for nurses, therapists and pharmacists. By offering unrivaled customer service, unique placement opportunities, top pay and benefits and employment that meets the lifestyle requirements of our clinicians, CareerStaff attracts high quality clinicians who transition well to new environments and rapidly assimilate into facility teams.

To learn more about CareerStaff Unlimited, LLC, visit [www.careerstaff.com](http://www.careerstaff.com) or contact Rebekah Naramore at 972-812-3211.

### **About Great Place to Work®**

Great Place to Work® is the global authority on high-trust, high-performance workplace cultures. Through proprietary assessment tools, advisory services, and certification programs, including Best Workplaces lists and workplace reviews, Great Place to Work® provides the benchmarks, framework, and expertise needed to create, sustain, and recognize outstanding workplace cultures. In the United States, Great Place to Work® produces the annual Fortune "100 Best Companies to Work For®" list and a series of Great Place to Work® Best Workplaces lists including lists for Millennials, Women, Diversity, Small and Medium Companies and over a half dozen different industry lists.

Follow Great Place to Work online at [www.greatplacetowork.com](http://www.greatplacetowork.com) and on Twitter at @GPTW\_US.

Appendix 8. CSU Vienna Example 2013-2018

<b>CSU Income Statement</b>				
	2013	2014	2015	2016
<b>Revenue</b>	\$ 85,000,000	\$ 88,000,000	\$ 90,000,000	\$ 96,000,000
% change		3.5%	2.3%	6.7%
<b>Human Capital Costs</b>	\$ 12,889,146	\$ 19,804,895	\$ 17,931,906	\$ 16,617,311
% Change		53.7%	-9.5%	-7.3%
% of Revenue	15.2%	23.3%	21.1%	19.5%
<b>Internal Employee Costs</b>	\$ 9,360,000	\$ 11,050,000	\$ 13,000,000	\$ 12,220,000
% Change		18.1%	17.6%	-6.0%
% of Revenue	11.0%	13.0%	15.3%	14.4%
<b>Support Costs</b>	\$ 3,276,000	\$ 3,867,500	\$ 4,550,000	\$ 4,277,000
% Change		18.1%	17.6%	-6.0%
% of Revenue	3.9%	4.6%	5.4%	5.0%
<b>In Lieu of Costs</b>	\$ 253,146	\$ 4,887,395	\$ 381,906	\$ 120,311
% Change		1830.7%	-92.2%	-68.5%
% of Revenue	0.3%	5.7%	0.4%	0.1%
<b>External Labor Costs</b>	\$ 57,358,548	\$ 56,186,472	\$ 62,869,105	\$ 70,185,005
% Change		-2.0%	11.9%	11.6%
% of Revenue	67.5%	66.1%	74.0%	82.6%
<b>All Other Operational Costs</b>	\$ 11,752,589	\$ 12,077,153	\$ 11,900,000	\$ 12,955,000
% Change		2.8%	-1.5%	8.9%
% of Revenue	13.8%	14.2%	14.0%	15.2%
<b>SG&amp;A</b>	\$ 4,527,504	\$ 1,020,078	\$ 1,161,564	\$ 220,914
% Change		-77.5%	13.9%	-81.0%
% of Revenue	5.3%	1.2%	1.4%	0.3%
<b>EBITDA</b>	\$ 1,527,786	\$ 1,088,598	\$ 3,862,575	\$ 3,978,230
% Change		-28.7%	254.8%	3.0%
% of Revenue	1.8%	1.3%	4.5%	4.7%
<b>Financial Capital Costs</b>	\$ 2,730,373	\$ 2,730,639	\$ 2,464,351	\$ 2,260,526
% Change		0.0%	-9.8%	-8.3%
% of Revenue	3.2%	3.2%	2.9%	2.7%
<b>Interest</b>	\$ 1,971,719	\$ 1,947,562	\$ 1,881,356	\$ 1,645,253
% Change		-1.2%	-3.4%	-12.5%
% of Revenue	2.3%	2.3%	2.2%	1.9%
<b>Depreciation</b>	\$ 758,653	\$ 783,077	\$ 582,995	\$ 615,273
% Change		3.2%	-25.6%	5.5%
% of Revenue	0.9%	0.9%	0.7%	0.7%
<b>Amortization</b>	\$ -	\$ -	\$ -	\$ -
% Change		#DIV/0!	#DIV/0!	#DIV/0!
% of Revenue	0.0%	0.0%	0.0%	0.0%
<b>Cost of Equity</b>	\$ -	\$ -	\$ -	\$ -
% Change		#DIV/0!	#DIV/0!	#DIV/0!
% of Revenue	0.0%	0.0%	0.0%	0.0%
<b>Shareholders Equity</b>	\$ (1,288,740)	\$ (3,262,688)	\$ (1,864,464)	\$ (146,760)
% Change		153.2%	-42.9%	-92.1%

<b>Vienna Index Values</b>				
<b>Human Capital ROI</b>	-9.3%	-8.3%	7.8%	10.3%
<b>Productivity</b>	\$5.44	\$3.90	\$4.41	\$5.09



## Human Capital ROI



- **Money invested**
  - Employee costs – *Pay, Benefits & Taxes*
  - Costs in support of employees – *Variable employee costs*
  - Costs in lieu of employees – *employee substitution costs*

EE      direct sal + burden  
 support      direct travel + direct other less travel stipends, meals & purchased services  
 in lieu      direct purchased services

$$\text{Human Capital ROI} = (\text{EBITDA} - \text{Financial Capital Costs}) / \text{Human Capital Cost}$$



## Human Capital ROI



- **Money gained or lost on the investment**
  - EBITDA – *Earnings before Interest, Taxes, Depreciation & Amortization, less*
  - Financial Capital Costs – *Interest, Depreciation, Amortization & Cost of Equity*



## Revenue Value-Added Formula

$$\text{Productivity} = \frac{\text{Revenue} - \text{Raw Material Costs}}{\text{HCI} + \text{FCC}}$$

*U.S. Patent No. 7,983,945*

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