

Bates

Office of Human Resources

Meeting date: Tuesday, October 3, 2023
Attendees: Joe Castonguay, Hope Burnell, Jess Berry, Zach Brown-Cross, Megan Couch, Sylvia Deschaine, Curtis Johnson, Keiko Konoeda, Nora Molloy, Patty Rooney
Absent: Mark Cayer, Alec Morrissey, Andrea Trumble

MINUTES

1. Welcome and icebreaker activity

The facilitating group member noted that it was the Mid-Autumn Festival in Asia (Also called the Moon Viewing Festival in Japan) and asked the group to share what they like to do in Autumn or what they would do if they were on the moon.

2. Review of previous notes and agenda

No post-meeting notes were collected following distribution of the previous set of minutes.

3. Consideration factors for potential vendors

Hope shared a summary of some of the key factors for the group to consider when selecting vendors to bring in for demonstrations and proposals. The factors are based on the themes information from the spring input sessions and previous working group discussions.

- Accessibility
 - DEI
 - Speed to deploy
 - Data and how it can be drilled down
 - Supervisor/leadership drill down
 - Since supervisors are in a strong position to be able to influence their employees' work environment, supervisors will need clear data and reporting from the survey to understand their impact and opportunities for deepening engagement in their departments and across the organization.
 - Customization options
 - Free text (ability for participants to enter feedback and suggestions independent from survey questions)
- Hope shared information on other survey efforts at the college:
 - DOF is working to launch the COACHE survey which is specifically for faculty and is being prepared to be launched in February. This is a survey that the school has done in the past, so repeating it to be able to look at the trend over time is important.
 - The Office of the Vice President for Diversity, Equity and Inclusion is looking at a climate survey which would include faculty, staff and students and help the college to understand the experiences of all of our community with one consistent survey tool.

- Hope, Leana and Matt Duvall are working to ensure that surveys are being planned with consideration for one another and an eye toward avoiding survey fatigue.
- A member noted that the faculty and staff are getting different surveys and wants to know what happens for people who are both faculty and staff. Hope will seek clarification on this question. One reason the COACHE survey is being implemented is to be able to compare results from the previous survey.

4. Discussion of potential vendors

Prior to the meeting the group was provided with links to explore the websites of seven vendors with a goal to discuss the vendors together and narrow the choice down to a maximum of five to invite for demonstrations and requests for proposals. The following are notations from the group discussion.

- [Korn Ferry](#)
 - Website had good customer reviews
 - Was specifically focused on surveys as opposed to a whole suite of HR products
 - Helps decipher data and develop action plans
 - Highly customizable
 - Robust benchmarking (noted that the group should ensure that educational institutions are one industry they have the specific ability to benchmark for)
- [Gallup](#)
 - Science based
 - Intuitive questions
 - Name recognition could be good or not (i.e. much of their name recognition is related to political surveys)
 - Internationally known and recognized as an industry leader
 - Benchmarking is strong
 - Allows you to purchase it just once and not be tied to it for repeat surveys
- [Culture Amp](#)
 - Attractive website easy to navigate. Clearly good with marketing
 - They are set up as an app, didn't appear to offer as much support
 - Has good templates and tools for action
 - Not a lot of information available without engaging with their sales team
 - Had an employee turnover forecast that was unique
- [Mercer](#)
 - Has a DEI section but it seemed like a secondary snapshot option and it was unclear if it was an add on service
 - Website and service seemed underwhelming and provided little information
 - Real time results and tracking are available
- [Rankin Climate](#)
 - Very academic focused. Reviews were primarily from educational institutions. Some very prestigious institutions have used them and the reviews referenced the impact of what the survey allowed them to do.
 - Their website used pedantic language and made things more complicated than it needed to be.
 - It appears very customizable which a member noted might mean an extended timeline

- Hope noted that the climate and COACHE surveys which may be beneficial where the college is looking at multiple potential surveys
- [Deloitte Engage Path](#)
 - Website used small fonts which makes reading more difficult - a challenge for accessibility
 - Surveys seemed to be intended to be implemented repeatedly over time which we may not be looking for
 - Has some focus on higher education
 - Emphasized *Simply Irresistible Organization* themes
- [Lattice](#)
 - Appeared to be promoted as an overall suite of HR tools, and lacked specific focus on surveys.
- **Decision Point**
 - The group planned to bring in five vendors for demonstrations and requests for proposals. Four vendors were chosen: Korn Ferry, Gallup, Culture Amp, and Rankin Climate

5. **Planning for presentation to President's Council on Oct. 10**

The group discussed information to cover in the update to the President's Council next week.

- **Goals for the update:**
 - Show that there is an engagement strategy and operational plan that combine a long-term focus with short-term action and flexibility
 - Share ideas of things they can do now to increase engagement, including encouraging President's Council members to adopt some of our practices and use the information contained in the themes summary to increase engagement now (Increase transparency, show appreciation consistently and in a manner that resonates with the recipient, tap into employees' expertise (especially of those doing the work) before decisions are made, saying thank you (informal recognition), providing flexibility in where and when employees work when possible)
 - Generate ideas about how to promote survey participation
- The presentation should have an interactive element and this could be a brainstorming session with the group
- The members of the President's Council should hear directly from the working group members.
- Intent is to have all group members introduce themselves
- A group member noted that the audience should hear a little bit of people's positive personal experience working within the group itself
- A group member proposed the idea to run the meeting similarly to how the working group meetings are run with ice breakers and meeting rankings
- A member proposed that there would be time for the brainstorming session to be divided up between tables - each given different elements of survey promotion to discuss - for example how the survey is promoted in different divisions, but different levels of supervisor, to different audiences with different considerations. That would broaden the input and reduce

repetitiveness of input from different brainstorming groups

- **Decision Point and Action Steps**

- Group members were asked to contact Hope if they do not want to have a speaking role or have other considerations for how they would like to participate in the presentation
- Patty, Sylvia and Joe are going to meet to lay out a proposed structure for the presentation
- Time in Commons room 221/222 has been reserved on October 5 from 1:30-3:30 for folks who want to see the space and get accustomed to the layout and audio visual tools

6. Wrap up and ranking

- Meeting feedback and ranking

- Things that went well

- (1) Vendor review process
- (2) Great discussion about President's Council
- (3) Good ice breaker question
- (4) Comfortability with the group continues to grow
- (5) Appreciation that group members put effort into looking at the vendor information in advance.
- (6) Activities and discussion were well facilitated

- Things to improve

- (1) Was unfortunate that we didn't have time as a full group to plan out the presentation for the President's Council
- (2) Three members were not able to attend and were missed. Patty and Hope will follow up with them to get their feedback on the vendors

- **Meeting ranking:** 9.35