



## Opportunity by Design: A Discussion on Growing Worker Skills and Talent in the Workplace – Transcript

Hosted by the Aspen Institute Economic Opportunities Program

September 14, 2022

### Description

Training and learning opportunities are an important part of the design of any job. Frontline workers recently rated job growth and learning opportunities in the top three things they want in a job. Many workers, however, receive little, if any, training from their employers. This lack of investment in workers' skills impedes workers' opportunities for advancement, trapping many in a cycle of dead-end, low-quality jobs where women and people of color make up a disproportionate number of workers. For businesses and employers, failing to invest in workers is also costly. In addition to a disengaged workforce, many employers face high turnover when they do not invest in their workers. In the past year, the top reason workers globally left their jobs was due to a lack of career development and advancement opportunities. Businesses that invest in workers' skills development and design jobs with work-based learning (WBL) opportunities, however, offer a more promising path.

When designed well, work-based learning provides a number of benefits to workers and businesses. WBL approaches such as apprenticeship, on-the-job training, and other forms of employer-sponsored training can offer workers the opportunity for upward mobility and the chance to earn and learn at the same time while employers gain a more engaged and skilled workforce. Too often though the frontline workers who could benefit the most from work-based learning do not receive the opportunity. How can businesses design jobs that include quality work-based learning that improves opportunity for workers and business outcomes? What barriers and opportunities do employers face in creating apprenticeship and other work-based learning models, particularly for front-line workers? What can we do to equitably expand work-based learning to workers who need it the most?

This is the second conversation in our three-part series, [The Job Quality Choice: Opportunities and Challenges in Job Design.](#)

For more information and resources from this event, visit [as.pn/skills](https://as.pn/skills).

## Speakers



### Daniel Bustillo

Executive Director, Healthcare Career Advancement Program (H-CAP)

Daniel Bustillo is executive director of the Healthcare Career Advancement Program (H-CAP), a national organization of SEIU locals and healthcare employers who are partnering in support of developing quality healthcare career education models for high-road jobs that increase equity in the healthcare workforce. During his time at H-CAP, Daniel has led numerous policy and programmatic initiatives designed to support healthcare workers and caregivers, such as the Center for Advancing Racial Equity and Job Quality in Long-Term Care. As director of the National Center for Healthcare Apprenticeships, he has played a leading role in developing Registered Apprenticeships in healthcare across the nation over the past six years.

Prior to joining H-CAP, Daniel was an assistant director with the 1199SEIU Training and Employment Funds, which provides training, job placement, and quality improvement programs to over 700 healthcare employers and 250,000 workers in New York, Massachusetts, New Jersey, Maryland, Washington DC, and Florida.

Daniel presently serves as a member of the US Department of Labor's Advisory Committee on Apprenticeships, sits on the board of directors for the National Skills Coalition, and is a 2022-23 Aspen Institute Job Quality Fellow.



### Jocelyn B. Caldwell, Ed.S.

VP, Workforce Strategy and Organizational Growth, Walmart

Jocelyn is a senior leader with experience leading organizational transformations and deploying talent strategies within culturally diverse environments. She refers to herself as an “institutionalist,” one who believes institutions can both be profitable and have positive impacts on society. She is passionate about providing skills, opportunity, and access to this and the next generation of the workforce.

Jocelyn currently leads the workforce strategy and organizational growth at Walmart, where she defines and optimizes the workforce and organization required to deliver Walmart’s business strategy. Previously, she held the position of Talent Partner for Sam’s Club, where she led, defined, and drove the talent strategy for their associates.

Jocelyn joined Walmart from TIAA, where she held the position of Vice President, Talent Acquisition and Workforce Strategy and HR Strategy and Planning. She also was responsible for identifying and leading transformation initiatives to increase efficiency and effectiveness, while reducing costs and risks across TIAA. Prior to joining TIAA, Jocelyn helped to build the university-wide institutional effectiveness capability at Howard University. Jocelyn also held a series of positions of increasing responsibility and complexity during her tenure at The South Carolina Retirement Systems, Westinghouse Nuclear Fuel, and General Electric. She is a certified Six Sigma Black Belt and Project Management Professional.

She has served on the advisory board for the Center of Applied Business Analytics at the University of South Carolina, the Clemson University Black Alumni Council, and the Clemson University Board of Visitors. She is a member of Alpha Kappa Alpha Sorority, Inc. and The National Smart Set, The Links, Inc.

Jocelyn and her husband, Darryl, have two sons and currently reside in Columbia, South Carolina.



**Kim Gregorie**

Head of the Business and Program Office for Talent Development and the Global Career Experience, JPMorgan Chase & Co.

Kim serves as the head of the Business and Program Office for Talent Development and the Global Career Experience. She is a senior executive and transformational business leader who brings a record of success in driving high impact learning and human capital management programs at the top levels of a global business. In this role, Kim leads cross-sector engagement with higher education external partnerships while consulting with talent executives and internal senior business leaders to identify and apply best-in-class learning solutions in support of JPMorgan employee job proficiency, career development, and future of work readiness objectives.

In this role, Kim leads cross-sector engagement with higher education external partnerships while consulting with talent executives and internal senior business leaders to identify and apply best-in-class learning solutions in support of JPMorgan employee job proficiency, career development, and future of work readiness objectives.

In her 23 years with the firm, Kim has established herself as an accomplished change agent and leader who operates effectively in dynamic environments. Prior to her current role, Kim held a variety of leadership positions in consumer banking, including district manager and regional wholesaler manager, and she supported various strategic special assignments.

Kim was awarded an MBA from Tulane University's Freeman School of Business and a bachelor's degree from the University of the Pacific. She also completed training at the T. Boone Pickens Leadership Institute. Kim also serves as the HR Learning Lead for the DFW market and is a member of WOTM and PRIDE Business Resource Groups.

A California native, Kim resides in Dallas, and in her free time, she enjoys riding her Peloton, entertaining, playing golf with her teenage son, and finding activities to give back to the local community.



**Paul Osterman**

Nanyang Technological University (NTU) Professor of Human Resources and Management, MIT Sloan School of Management

Paul Osterman is the Nanyang Technological University (NTU) Professor of Human Resources and Management at the MIT Sloan School of Management as well as a member of the Department of Urban Planning at MIT. From July 2003 to June 2007, he also served as deputy dean at the MIT Sloan School. His research concerns changes in work organization within companies, career patterns and processes within firms, economic development, urban poverty, and public policy surrounding skills training and employment programs.

Osterman has been a senior administrator of job training programs for the Commonwealth of Massachusetts and has consulted widely for government agencies, foundations, community groups, firms, and public interest organizations.

His most recent book is "Who Will Care For Us: Long Term Care and the Long Term Workforce." Other recent books include "Good Jobs America: Making Work Better for Everyone"; "The Truth About Middle Managers: Who They Are, How They Work, How They Matter"; "Gathering Power: The Future of Progressive Politics in America"; "Securing Prosperity: The American Labor Market: How It Has Changed and What to Do About It"; and "Working In America: A Blueprint for the New Labor Market."

Osterman is also the author of "Employment Futures: Reorganization, Dislocation, and Public Policy"; "Getting Started: The Youth Labor Market"; "The Mutual Gains Enterprise: Forging a Winning Partnership Among Labor, Management, and Government"; and "Change At Work." He is the editor of two books, "Internal Labor Markets" and "Broken Ladders: Managerial Careers in the New Economy." In addition, he has written numerous academic journal articles and policy issue papers on topics such as labor market policy, the organization of work within firms, careers, job training programs, economic development, and anti-poverty programs.

## Moderator



**Abha Bhattarai**

Economics Correspondent, The Washington Post

Abha Bhattarai is the economics correspondent at The Washington Post, where she writes about housing, jobs, inequality, and workers' issues. She was previously the Post's retail reporter and won a Gerald Loeb Award for her coverage of essential workers on the frontlines of the pandemic. Abha is a graduate of Northwestern University.

## About

### Opportunity in America

[Opportunity in America](#), an event series hosted by the Economic Opportunities Program, considers the changing landscape of economic opportunity in the US and implications for individuals, families, and communities across the country. The series highlights the ways in which issues of race, gender, and place exacerbate our economic divides, and ideas and innovations with potential to address these challenges and broaden access to quality opportunity.

We are grateful to Prudential Financial, Walmart, the Surdna Foundation, the W. K. Kellogg Foundation, Bloomberg, and the Mastercard Center for Inclusive Growth for their support of this series.

### Economic Opportunities Program

The Aspen Institute [Economic Opportunities Program](#) advances strategies, policies, and ideas to help low- and moderate-income people thrive in a changing economy. [Follow us on social media](#) and [join our mailing list](#) to stay up-to-date on publications, blog posts, events, and other announcements.

## Transcript

### Maureen Conway (00:00:00)

Good afternoon and welcome. I'm Maureen Conway, vice president at the Aspen Institute and executive director of the Economic Opportunities Program. It is my pleasure to welcome you to today's conversation, "Opportunity by Design: Growing Worker Skills and Talent in the Workplace." This conversation is part of the Economic Opportunities Program's ongoing Opportunity in America discussion series, in which we explore issues affecting economic opportunity in the US, the implications for workers, businesses and communities across the country, and ideas for change. We're very grateful to Prudential Financial, Walmart, the Surdna Foundation, the W.K. Kellogg foundation, Bloomberg, and the Mastercard Center for Inclusive Growth for their support of this discussion series. And a special thank you to JPMorgan Chase for their support of our work on job design, including the basis for today's conversation.

Today's discussion is the second event in a set of three conversations, "The Job Quality Choice: Opportunities and Challenges in Job Design." In this series of conversation, we're examining some of the job design choices that contribute to our country's large share of low-quality jobs and how we can design good jobs that lead to shared success among businesses and workers, jobs that provide a family sustaining wage, opportunities for workers to grow and advance, and that have equitable and dignified workplaces where workers' voices and contributions are valued. In this second conversation today, we'll be discussing the job design choices employers make around developing and investing in worker skills and talents within the workplace.

Many seek opportunity to grow, develop, and advance as part of their job, to have a chance to learn and build talents and apply that to the work that they're doing every day. But many workers don't receive this opportunity in their work, and this is particularly true for many frontline and lower wage workers. And these workers, as we know, are predominantly women and workers of color. The business cost of this approach grew over the last year as many working people left their jobs because they weren't provided this chance to grow their talents in the workplace and advanced into better opportunities. So we see these job design choices, as we mentioned, as good for work, good for workers, and good for business as well.

Work-based learning such as apprenticeships, on-the-job training, and internships that combine working experience with skills development and learning offer potential pathway for helping workers advance while helping business develop and retain the workforce they need. And in addition, because of the demographics of the workforce, work-based learning can be a tool for advancing equity in companies. By combining earning and learning, work-based learning models offer job design that meets working adults who can't afford the high cost of college and don't have really the ability to stop working and spend their time just learning. So this ability to combine earning and learning is important, but we also know that this approach to learning is one of the best ways that people learn, by learning and then applying that in their work.

So what is standing in employers' way from making the choice to make these kinds of investments in their workers? What are the consequences when they don't and the rewards when they do? What job design practices and strategies can employers use in developing work-based learning initiatives? And what are the opportunities and limitations of work-based learning in helping workers to obtain high-quality jobs? So we have a great set of folks to talk about this with us today. I'm going to introduce them in just a moment.

Quickly, I will review our technology. Everybody is muted. We really welcome people's questions. Please use the Q&A button at the bottom of your screen to submit or upload questions. We know that many

people in our audience are also expert in this area and may have ideas, examples, resources, or experiences to contribute to the conversation. Please do share those in the chat. We also always appreciate your feedback, so please take a moment to respond to our quick feedback survey at the end of this session. We're really thrilled with the participation in today's event. Thank you to many of you who submitted questions in advance. We're going to try to get to as many questions as we can. We also encourage you to tweet about this conversation. Our hashtag is #talkopportunity. If you have any technical issues during the webinar, please do message us in the chat or email us at eop.program@aspeninstitute.org. The event is being recorded and will be shared via email and posted on our website. Closed captions are also available for this discussion. Please click the CC button at the bottom of your screen if you would like to use those.

Okay. Now, it is my great pleasure to welcome our panel and moderator. You can find more information about them on our website. In the interest of time, I'm not going to go into detail. I will just put sort of names to faces. So with us today, we have Daniel Bustillo, executive director of the Healthcare Career Advancement Program, H-CAP; Jocelyn Caldwell, vice president of Workforce Strategy and Organizational Growth at Walmart; Kim Gregorie, head of the Business Program Office for Talent Development & Global Career Experience, JPMorgan Chase & Co.; Paul Osterman, oh gosh, Paul, I just can't say that, Nanyang Technical University professor of human resources and management at MIT Sloan School of Management. I should've asked you about the pronunciation there.

We're very thrilled today to have Abha Bhattarai to moderate today's conversation. Abha is the economics correspondent at Washington Post, where she writes about housing jobs, inequality, and worker issues. So she's the perfect choice to moderate this conversation. But before I turn it over to Abha, we've asked Paul to kick off today's conversation by sharing some of his recent research that he's done looking at this issue of skills and employer investment in skills. So Paul, let me turn it over to you.

### **Paul Osterman (00:06:08)**

Thank you, Maureen. And thank you fellow panelists and everyone out there in TV Land. What I'm going to do is, I'm going to do two things. I'm going to just give you some very quick data from a new survey that I did on the extent of employer provider training, and who doesn't get it and who does get it, and what people want and how they assess it. And then I'll discuss briefly what I think are some of the key things to think about or to worry about in this arena. And then I will stop. Even though I'm an academic, I'm actually capable of stopping talking at some point. And that point will be fair fairly soon.

So let me begin with the data. I'm assuming everyone out there can see that. So what I'm going to do, it turns out that the federal government stopped collecting data on employer-provider training some time during the Reagan administration. There's actually no good nationally representative data on this topic. There is something called the ATED, Adult Training Education Survey, but it focuses only on credentials and not on employer training. So I went out there and did the survey. The survey was done in 2022 using the NORC AmeriSpeak Panel. It's for adults. It was done in English and Spanish. It's a pretty good sample size. And you can see who the nice people were who funded it. I'm going to only show you three slides from this. There's a gazillion other pieces of data that I could show you on this topic. In fact, I'll mention something at the end.

So the first kind of just question is, among the American workforce in 2020, the American adult workforce, how many people received training from employers and who were those folks? So overall, you can see among all employees, about 59% received employer training in the 12 months prior to the survey, and among new hires, it was about three quarters. There's no way of knowing whether that's a good number or a bad number, whether glass is half full or half empty, but it's not trivial. Right? The problem is, as Maureen indicated, that it's not equitably distributed. So if you have a college degree or more, as you can see on this slide, you're far more likely to get training from your employer than you are if you have a high school degree or less. This is really where the problem lies.

The survey asked people, thinking back on their career, what was the most important source of their skills? Where did they get their skills from? What would they rank number one? Number one was friends and colleagues. Now, friends and colleagues includes colleagues at work. So in some sense, at least some of these folks are talking also about training at the workforce, but close on the heels of friends and colleagues was employer-based training. These two considerations simply dominate relative to every other venue for training. Four-year colleges come next, followed by online, community colleges, for-profit schools, and job training programs. But people rank employer-based training basically as number one in terms of importance to them.

Last slide. We asked people, if you wanted to get more training from your employer, would it be available to you? Again, you see a terrifically large, unfortunately large disparity. 65% of people with a college degree or more say that if they wanted to get more training from their employer, they could, and only about 47% of high school folks say the same thing. So there's clearly, clearly a large gap and an equity gap with respect to training.

So what can we make of this? Now, I'm going to show you one more slide, when we get to the discussion, I should say. I could fill up the next six hours with slides from the survey, but the one additional slide I will show you will be on how much kind of work-based learning goes on in schools. And we can come back to that. What do we make of this? Well, the research evidence is quite clear that employer-based training pays off. The rate of return to employer-based training is high. It's high both for the workforce and it's high for employers too, with respect to quality of their products, services, and productivity.

So what's going on? Why are we worried besides the equity thing? Well, there's a reason to worry about what's going on because of several considerations. One is, over time, the human resource function in organizations has weakened. Human resource is largely outsourced in many places now. And even where it's not outsourced, the finance function, the operations function dominates in terms of internal organizational power relative to the human resource function. Not to mention what used to be called the industrial relations function. Neither of these are powerful in organizations anymore.

Training is typically seen as a soft expense that is a variable cost and can be easily cut with little consequence. And there's a considerable temptation inside of organizations to rely on the public sources of training, to put the burden on schools, to put the burden on community colleges, put the burden on four-year schools as opposed to on themselves. And this represents quite a considerable change over the last 20 or 30 years in terms of employer sense of responsibility for training.

There tends to be also a sense to underestimate the contribution that frontline workers can make to the success of organizations. And you see that in a lot of different ways. But I did a lot of work, Daniel appreciate this, I did a lot of work on home health aides. And if you talk to hospitals, if you talk to insurance companies, constantly denigrating the contribution of those folks to the performance of their organization, and that's true across the board.

So, just some quick thoughts on how you can think about fixing this. I mean, one way to think about fixing this problem is jaw boning. That is to say prestigious people, president of the United States, heads of business organizations, heads of unions, an occasional random academic talk about the importance of skills, the importance of training, and that makes some difference in the atmosphere around these issues. It does. I think it's a mistake to think none of that counts, but it's not going to really turn the ship around. Changing the structure of the tax system to incentivize employers to invest more in training is another way to go and providing incentives. So called on-the-job training incentives is another way to go. Money, money, money. Right?

The final way to go is something that I've done a lot of work on, and a lot of people are on this panel and a lot of people at Aspen have done a lot of work on, which is how you think about integrating job

training programs and community colleges, union management partnerships in a way that provides support to employers who may want to invest in training. Right? Because if training is seen as kind of a second level issue inside of organizations, you can try and reduce the costs and increase the perceived benefits if there's an outside organization, who can work with the employer to help identify people, to support people, to provide best practice examples of training. And I've worked with, and other people around this panel, and Aspen have worked with a number of best practice training organizations that work effectively with employers. So I think that's the kind of fundamental challenge, is not to ring our hands over the maldistribution about access to training, but to think about where the policy levers are to do something about it. So I'm going to stop there. Thank you.

### **Maureen Conway (00:14:36)**

Thank you, Paul. That was fantastic. I think that provides a lot for this panel to consider and talk about. So without further ado, Ava, I am going to turn it over to you to get started asking everybody some questions. Thanks so much for joining us.

### **Abha Bhattarai (00:14:53)**

Thank you so much, Maureen. Good afternoon, everybody. Thank you so much for joining us today for a conversation that seems to be getting more important by the day. We are two and a half years into this pandemic, and we've seen major shifts in how employees and employers view their relationships to work. We're seeing very acute labor shortages across industries and all of the challenges that come with that, of attracting employees, of keeping employees. So I'm really thrilled to be talking about how employers can not only create jobs but good jobs that actually allow workers to thrive and to flourish. So I would love to get started here with you, Jocelyn. And I'm wondering, Walmart is the country's largest private employer, how are you guys thinking about promoting employee talent and skills and why is that important to the business?

### **Jocelyn Caldwell (00:15:45)**

Well, I'll start off with saying that for Walmart, we've had a history, I would say, of mobility within the company. If you look at the stats, 75% of our salary managers started off as hourly associates. So in a lot of respects, we always knew that we needed to tap into our internal talent and provide paths for opportunities for them. The question is, how can we take what was happening organically and really be a little bit more intentional about it? So in 2016-ish, around that time but a little bit few years before then, we started implementing what we call Walmart Academies in our markets and in our regions across the nation. So that grew to about 200 plus of those. But what we're finding is that not everyone was able and taking advantage of those academies.

So during the times where we were really seeing, just like everyone else, labor shortages, what we've also done was we began investing. Paul, I think you talked about this. How can we invest in our associates that want to go back and get a certificate, that want to go back and complete a four-year degree or a two-year degree? So we started paying a hundred percent of that cost through what we call Live Better U. But we couldn't stop there because now we're diversifying. We've got the academies. We're helping with certificates, as well as with college or higher ed. But then the question becomes, what if neither one of those are options? And we are finding that we had labor shortages in some areas like truck drivers.

So recently, I don't know if you've heard, but we have now a 12-week development program where you can opt in to the 12-week program. And out of that, it's almost like a boot camp, then you become a truck driver, which we were having major shortages, and it increases your economic mobility because

now you're going maybe from an hourly associate to a wage or to a job that's paying over 100K a year. So we're constantly evolving and diversifying. And at the end of the day, we're doing it so that we can provide a path for opportunity and growth for everyone.

Abha, I think you're on mute.

**Abha Bhattarai (00:18:23)**

Thank you. Sorry about that.

**Jocelyn Caldwell (00:18:24)**

Mm-hmm. No worries. Oh man, we're only like 10 minutes into this. All right, I'm going to stay off mute now. Daniel, I wanted to move on to you. Tell us a bit about what you do at H-CAP and how conversations like this one on worker skills development sort of fit into the national discourse on job quality and perhaps more importantly, equality.

**Daniel Bustillo (00:18:45)**

Yes. I appreciate the question. And thanks, Maureen, and the team at Aspen for hosting this as well. It's a pleasure to be here. And Paul, thank you for lifting up what you talked about related to home health aides. I think we could talk about other members of the direct care workforce and how they're undervalued as well. And we certainly will. So just a little bit about H-CAP, H-CAP is a national labor management organization of SEIU locals and healthcare employers that are partnering on developing high-quality workforce and education and training options across all sectors of healthcare. So hospitals and health systems, nursing homes and home care. Our labor management training partnerships work primarily, but not exclusively, with incumbent healthcare workers. And I would reference that in a second.

Collectively, our network spans 16 states plus DC, almost a thousand employers, over 550,000 covered workers, and over a hundred thousand workers a year accessing some form of training across a wide spectrum of options from occupation specific to career advancement, which really enables a majority women and Black and Brown frontline healthcare workforce. Many of them also immigrants working in lower wage occupations, access to training benefits that are negotiated through collective bargaining agreements.

So we take a step back. Healthcare is obviously a large sector for employment with continued projections for occupational growth, but it's also a sector that suffers from job quality issues and occupational segregation with a really severe overrepresentation of Black and Brown women caregivers, many of the same caregivers that Paul was referencing in lower wage occupations. If we look at the history of our labor management training partnerships, as a matter of fact, the first one inception in New York City over 50 years ago was really a direct outgrowth of the civil rights movement, really designed to address many of the same issues that remain endemic in healthcare.

So at H-CAP, as both a policy and program delivery organization, our mission is really to promote job quality and equity for the healthcare workforce through high-road training partnerships and strategies that are focused at the intersection of what we're here talking about today. So educational attainment, but also racial and gender equity and job quality. We have a long history and orientation towards collaboration on the development of supply and demand side workforce solutions that really do equally center the needs of workers as true co-partners, and directly take into account the voice of

workers who too often have limited agency and are not part of the development process, even though they oftentimes have a great deal of untapped experience and expertise.

So finally, on the question of national discourse, I think this conversation is an excellent, important fit. Workers oftentimes self-identify access to educational advancement opportunities as a core component of a good job, but the details of such are really important so that we're not simply pursuing learning for learning sake, but that we're really helping to foster a fundamental shift in worker skills development orientation towards one that is much more explicitly grounded in the production of good jobs and fostering equity, and away from one that has, I think, by and large placed a disproportionate burden on workers themselves for that development as well. So looking forward to the conversation today.

### **Abha Bhattarai (00:22:19)**

Perfect. Kim, let's turn to you next. Can you tell us a little bit about what you do at JPMorgan, about your role there, and how you're thinking about talent development, particularly when it comes to frontline workers?

### **Kim Gregorie (00:22:31)**

Thanks so much. Happy to be here. So first of all, I have the opportunity to lead our talent development as well as our career experience here at JPMorgan Chase, which is truly an honor when we think about the 250,000 plus employees that benefit from that. So when I think about what we're trying to do, I have a t-shirt that I had made that I often walk around wearing, which has hashtag #jobs. Because in the world that I sit in, I think what we've got to do is one, when we think about listening to our employees, employees don't want to do things that don't lead to jobs. So why would we have career development that doesn't lead to a job? And you're going to hear me say that a lot today, because if there's not a job at the end, then it's sort of this in vain activity.

When we think about the ecosystem that we live in today, we could all look and see that in the estimates that are out there, that we've got 375 million workers that are estimated to need new or upgrade their skills by 2030. That's so different any of the spaces that we work in. So when I think about talent development at JPMorgan Chase, we are committed to, and we look at our employees and say, how do we help them be ready for those changes? Because employees know that there are changes in the digital space, that technical skills they need, the professional skills they need. And then the day-to-day skills they're going to need, they're going to change as technical evolution continues to change the way that we interact with our customers.

So we know we have really smart people here. We know that they want to do well. So what we look to do is figure out how can we, in all of the programming that we have, put in front of them options that help them be better in the role that they're in today and be better for tomorrow. The way that I always look at it is, hire someone for their first job, train them for their second or third and their fourth. So that requires programming, that's constantly being touched, constantly being altered. It's not about what I think; it's about what employees are saying. And that's how we should be looking at these talent development programs.

### **Abha Bhattarai (00:24:30)**

Perfect. That's actually a great segue to our next topic, which is what these ideas look like in practice. I'm hoping that we can get some specific examples on how you guys structure these programs and how you gauge success because this is not sort of a one-size-fits-all strategy. And I'm sure you're

constantly having to calibrate and adjust. Daniel, let's start with you. I want to talk specifically about apprenticeships. What do you define is a quality and effective program? Give us some examples. I know many companies are just starting to get started in this space. What do you look for for a successful apprenticeship program?

**Daniel Bustillo (00:25:06)**

Yeah. So if we think about the healthcare sector, we have a long history of apprenticeship, like training models, but a very short history of any sort of formal uptake of the registered apprenticeship process as we know it. So that's something that over the past six, seven years with the federal investment, there have been greater efforts to expand into non-traditional industries. So I think from our perspective, when we think about the fact that we were certainly seeing a situation where the accessible career mobility options for healthcare workers were becoming increasingly difficult. We talk quite frequently about pathways, but when we actually look at the number of folks who are able to progress along those pathways on an annual basis, relatively small as well.

So there are some core components of a registered apprenticeship program. It was already attractive because of some of the mandated components of a registered apprenticeship program. Things such as the fact that it's a paid job from inception, with requirements around a wage progression for competency attainment. So as I referenced before, not simply learning for learning's sake, but tangible benefits and protections for workers in those programs and benefit to the employers as well.

Other important components in my estimation in defining equality and effective program. Some of these are from my perspective in the healthcare sector and the work that we do and how we're structured. But when thinking about the ecosystem of partnerships, certainly it's important to have supply and demand side stakeholders to be part of that process, and equal co-partners in part of that process. In healthcare, we think supporting competency-based programs, that's the tack that we've taken. And we think that definitely is, from a quality perspective, the way to go. I think a clear and well defined alignment and interaction between what's called an apprenticeship-related technical instruction, basically the classroom component and the on-the-job learning component as well, those should be in interaction, well aligned, and supporting each other throughout the process to really support adult learners.

Third, I would say a strong and structured mentorship component. Mentorship is a key consideration differentiator for a registered apprenticeship program. And it's not only a benefit to the apprentice. If we take a step and think about it, really a benefit to the mentors as well, who should be compensated for their work as mentors as well. Then fourth, I would say, they should be truly debt free. We oftentimes hear about the apprenticeships is debt free. They should be truly debt free. There are some models that have been built up where that's not necessarily the case. Fifth, the necessary supportive services, which we oftentimes talk about, not just childcare and transportation, but those things that really do impede in addition to those two really important considerations that really impede someone's progress and programs.

Fifth, worker voice. So the example that I'm going to lift up as well is a partnership that we work with out in Washington state as part of our network. There was a healthcare apprenticeship consortium out there, that with the sponsor is one of our labor management training partners, the SEIU Healthcare 1199NW Multi-Employer Fund. It's a multi-union, multi-employer registered apprenticeship program that is open to employers in the state of Washington as well. But workers themselves are integral components of program oversight, but also informing the development of the models themselves as well. So you have experienced people that are actually informing the development of the programs too, so true mechanisms for worker voice. I think those are some of the key considerations when I think about quality apprenticeship programs.

**Abha Bhattarai (00:28:52)**

Perfect. Can you elaborate a bit about the competency based program? What does that look like and how is that different from other styles?

**Daniel Bustillo (00:29:01)**

Yeah. I mean, all our models, all our registered apprenticeship models that we have developed are competency based. There's still a little bit of a gray area as to how that relates to registered apprenticeship, but it's really that you should progress in the program based upon your ability to demonstrate competency attainment, as opposed to how long you are in a particular program. So we think, especially when you think about incumbent workers with a lot of potential experience in healthcare, that is certainly something that they should be rewarded for their experience and knowledge and the competencies they've obtained through previous experience as healthcare workers.

**Abha Bhattarai (00:29:41)**

Fantastic. Kim, I love what you said about hiring people for their first job and then training them for subsequent ones. And I'm wondering if you can talk a bit about your framework for frontline workers. How did you guys come up with this strategy and how have you developed it to what it is today?

**Kim Gregorie (00:29:57)**

Yeah. So I hear Daniel saying the worker voice a lot, and I would say that everything for me always starts with the employee's voice. I know it drives my team crazy, but when they come to me with a great idea, I always say, "Is that you sitting around in a room coming up with that, or did you talk to people that actually do the jobs and understand what they're looking for and what they need?" And that is really how this all started. The work that I do actually wasn't in existence a few years ago at the level that we're engaged now. We sat down and said, "Gosh, we're doing a lot of work in a number of different ways. So let's go find out what employees are saying," and spent time with hundreds of our frontline workers, just talking to them about what they needed, what were the blockers, et cetera. And people told me the same thing, no matter what city I was in, no matter what type of facility I was in for JPMorgan Chase.

Our frontline workers really said to me, "Kim, I know the world is changing. I know I need new skills, but even if I knew what those skills were, I don't know how to go get them and I don't know what it means once I get them so help me." And that was really the basis of programming that we did, which led into also in conversations with business leaders about, "Hey, how are you going to help us help your employees be able to get through programming, have time to take programming, be able to engage? And then how are you going to help them through mentorships, through utilizing our HR talent pieces to drive people into new roles?"

I do think that, Daniel mentioned it and Paul had some commentary around, I wrote it down here, the burden is on schools versus the organization. And I think one of the things that we also did that I think was important was, when we think about what I said about jobs, we had internally say, our programs need to be targeted at pointing people on pathways that lead to that job. But there's also an onus on us to be working with educational institutions to say, "Hey, here's what we're looking for." So we did some work where we build out some knowledge, skills, and abilities that were necessary for some worker on data and analytics roles. We didn't do that alone. We did it with the leaders in those businesses.

And then we worked with schools and said, "All right, here's what we need. What do you have in the form of curriculum?" And if they didn't, we'd say, "Hey, well, we want to let you know, this is the kind of curriculum that we need. How can we make that happen so that then the students we have can come into your educational institutions, get the certificate and or degrees that will drive them into those roles?" And I think that was really important. And it's led us to have statistics that show us, as people participate in the programming, the propensity for them to get a new job is double what it is if they don't participate in the program. So we know that if you build it, they will come. And then if you build the right programming, it leads to jobs.

**Abha Bhattarai (00:32:56)**

Perfect. Can you tell us a bit about who the frontline workers are? When you say frontline workers at JPMorgan Chase, who are you talking about? And then what are some of the pathways that are available to them? What sort of jobs can they work up to?

**Kim Gregorie (00:33:07)**

Yeah. So I think we have a ton of variance. We're such a big organization. We have entry level data and analytics opportunities. We have entry level within our branch network. We have entry levels in our call centers. We have entry level within our back office. I mean, there's just a host of roles. What I would say is this: We've also done a lot of work internally to build out a system that allows an employee to go in and assess themselves against their capabilities. And we know that those capabilities, they have five varied levels, but we know that they go across 80% of the roles within JPMorgan Chase.

So if you go in and you say, "Gosh, I'd like to get better at data literacy." Who couldn't be better at data literacy? All of us could get better at that. I want to get better at that. You can assess yourself and then learning begins to be sent to you automatically within 24 hours. We're continuing to get better at that. But when I think about it, that allows employees across the firm to have access to programming. It's not done by line of business, which I think is also helpful in giving opportunities across and in varied spaces within the firm.

**Abha Bhattarai (00:34:17)**

Great. Jocelyn, I'm wondering if you can talk to us about Walmart Academy. What have you guys noticed since you first set it up? And how do you assess success? How do you know whether things are working? What sort of metrics do you look at? And how do you make sure this is something that's working for both workers and for the business.

**Jocelyn Caldwell (00:34:33)**

Yes. I think the point of it that you asked about, how do we ensure that it's working for workers and the business, I want to emphasize that because I think oftentimes we think about the investment that we're making in our frontline workers. Yes, we want to invest in them, but it also helps us better serve our customers. And it's good business as well. So for Walmart Academy, there are a couple of things that we've learned along the way. One is, personalize the experience for our associates. Kim, you've talked about what is the associate saying, what are the employees saying, meet them where they are. First of all, we want our associates to be able to do the job that they're doing and learned in the job that they have today. So what we've done and we'll continue to do is leverage technology.

It's amazing how something as simple as a mobile handheld in the hand of an associate so that they can understand and they can learn how to do their job that they have now and do that well. But then it also offers opportunity for learning, offering up job prompts. It also helps them understand what are possible career paths. But not only the career paths, what are the skills that I need to have developed to go along that path? So it goes back to meet them where they are and start in the job that they have today. Then it can involve from that. I talked about our academies, we're moving to a global academy. We have 2.3 million employees or associates, so now there's just many different ways that you can leverage because we're so diverse. So we have the jobs that we have today, but what about those skills for tomorrow?

So what we are finding is identifying the skills and capabilities that you need for tomorrow. An example of this is, two or three years ago, who would ever thought that we needed in-home delivery? So that's a business need that we have, that we translate that into providing development for our associates. These are new jobs, these are new roles, which requires new skills. So now we are able, as part of Walmart Academy, to upscale our associates. So now that they are able to have access to those jobs and those opportunities. And from there, how do we then batches this with, "I want to move into leadership"? So we're finding that in our Walmart Academy, we are also leaning in to leadership development in many different ways. Some of it is virtual, some of it's going to be part of brick and mortar. But if you think about the outcome that we are trying to achieve, it's not development for development sake, but development so that the associate can move and can progress in the organization. And we are seeing that having those diverse pathways are working.

### **Abha Bhattarai (00:37:46)**

Fantastic. Paul, I want to bring you back into the conversation here. Your research looks into how employers help their employees develop skills and lays the groundwork for higher quality jobs and better business performance. Can you give us some examples of companies that have done this especially well, and some pointers for what other businesses can learn from them?

### **Paul Osterman (00:38:08)**

Sure. But let me, if you don't mind, as a good politician say, thank you so much for that question. I'm going to answer a different question.

### **Abha Bhattarai (00:38:17)**

Sure.

### **Paul Osterman (00:38:19)**

Because I've been watching the news. I know how they do it. We'll come back to that question. Okay? I just want to make a couple comments and then give you two more quick data slides. The comments are, I think what we've heard are examples of really committed organizations. But keep in mind, we're in an amazingly difficult, different, unusual point in a business cycle, the tightest labor market since who knows when. It's not always going to be that way. So I think the challenge for organizations is going to be how you institutionalize the commitment to training so that it survives the business cycle. So that's not something that's happening today, but is not happening when the labor market turns down. I think that's really an important consideration.

I guess the second kind of just general comment I want to make is that it's important, and I think everyone recognizes this, not just to train people to do a better job at the job they're doing today, but to build ladders inside of organizations. Part of the job of the training function is to create those ladders and to create them as internal, as opposed to hiring only people from the outside. So there's kind of structural challenges that people need to face. Now, if you give me one more minute, the discussion has been about work-based learning and also about credentials. I'm going to give you two more very fast slides because those are the two buzzwords out there right now, occupational-based credentials and workplace-based learning. Let me show you how rare that is in the labor market today. Both of those are rare in the labor market today.

So the survey did ask people, did you do any work-based learning while you were in community college for your college or a for-profit organization? Did you also work at an organization as part of that educational experience? Overall, only of 16% of the people answered yes to that. And this includes apprenticeships, because apprenticeships are an example of work-based learning. Again, there's a tremendous disparity by education level. The survey also asks, do you have an industry-certified occupational credential? There are about a quarter of the people do have that, but again, there's tremendous disparity by education. So these kind of buzzwords, and I don't mean that in a negative way, but they are kind of ideas de jure, haven't really caught on at scale yet. And I think that that is a significant challenge.

As far as the best organizations that are doing this kind of thing now, I mean I very much respect what Walmart Academy is doing. I very much respect what Amazon is doing for its warehouse workers. I very much respect what 1199 SEIU has done around the country for healthcare workers. What tends to be missing in all these discussions about these best practices are data. I mean, a couple of slides on how many people and what they learned and what happened to them afterwards for all of them, all these efforts, I think would help a lot in terms of the conversation. Other best practice examples and the high road discussion often tend to be idiosyncratic companies that are owner-owned or are unusual in some particular way. I think the really important question is, for publicly traded large organizations, what does best practice look like at scale? And I don't think we have a good grip on that in ways that we can quantify that.

### **Abha Bhattarai (00:42:14)**

Perfect. Actually, this is a great segue to a few viewer questions that we've gotten. You mentioned Amazon, you mentioned Walmart, these beam of companies, but what can small businesses do? What resources and support is available to them if they want to invest in their employees?

### **Paul Osterman (00:42:31)**

So small businesses that I've looked at and talked to can be effective on this if they work through local industry associations. So a great example of this in various parts of the country is the machine tool industry, where the National, I'm going to get it wrong, but Machine Tool Association has local chapters and often work with high schools and community colleges to design entry points and apprenticeship programs and work shadowing. So the trick for small businesses, I think, this is the politically charged word, is to collectivize, because you're worried about poaching. If a small business makes a big investment in training, you're worried that a large firm is going to come along and grab that person. But if small businesses operates through associations or groups with a job training program or a community college or a four-year school, it's a focal point, then they can avoid that kind of risk and essentially achieve scale.

**Abha Bhattarai (00:43:28)**

Great. Daniel, do you want to contribute to that? Do you have a sense of what small businesses can do to make this a successful partnership?

**Daniel Bustillo (00:43:40)**

Nothing to add beyond what Paul laid out as well too. I mean, it's a difficult conversation. If you think about the healthcare sector, we do not have 50 state employers in the healthcare sector as an example. Two considerations: one is that we do have many smaller firms, but we also have funded through government funding as well. Right? So that's an entirely other layer of the conversation that I think is an important consideration and come back to, I think, at the end of some of the points that fall maybe, which I think are important considerations and important points to bring up in of thinking about where are we going next.

**Abha Bhattarai (00:44:15)**

Great. So on the flip side of this, we've talked a lot about the benefits of these programs, but there are also challenges that come with them, and I'm wondering if we could dive into that a little bit. How do you stop and assess and then adjust as necessary? Kim, I'll start with you in this one. There's so many examples of employers trying these sorts of work-based learning programs, and then finding that there are glitches along the way. Maybe workers go through this training and then they just find there's no reward for their skills, it's not necessarily tied to a job they can immediately take. Or maybe there are time constraints or financial issues that sort of cause things to fizzle out. And I'm wondering what some of the obstacles you have that you've encountered in this space and how you guys have addressed this.

**Kim Gregorie (00:45:01)**

Everything you just said and... So I think to start this conversation, I think one of the most important things to think about when we think about adult learners is the number one reason, and Jocelyn touched on this a bit in the beginning but I want to bring it back to the forefront. The number one reason why an adult learner does not go back and get their education is money, is the lack of funding. So I think that that's really important as you're bringing forward programming, how are you supporting that being at no cost to your employees? And I'll come back to that in a minute. But I think overall, when I think about things that were obstacles or blockers, the first thing for me was, we had to really recognize that what got us here, wouldn't get us there. What got us to today, wasn't going to get us where we wanted to go.

And for a lot of reasons, one, the turnover of skills today is so fast and you've just got to be able to keep up with it. And I've written down a couple things. And the ability for skills to become a currency across your firm and then external to your firm too, if somebody decides to leave. So I've gained this skill, what does that mean? And how can I utilize it? I think those are some of the things that become very difficult to quantify, or the word I always use is exhibit currency. I also think that making this concept of continuous learning a part of our everyday DNA, making it a part of our performance, making it a part of our hiring practices, making it a part of our job descriptions, making it a part of everything we do from a management leadership standpoint is hard.

It takes every single day going out there and heading the pavement and talking to people and letting them know the benefits of, when we help an employee to have these opportunities, what does that mean for them as they contribute back to the organization? And we know that employees are more

engaged so employees perform better. We know that employees are less likely to attrite. So all those things come with benefits.

I would also say that designing programs that are, to the point you were making around time, et cetera, designed for adult learners. Saying to a frontline worker, "Oh, we're going to have a program across the street at so and so university. So you can go at four o'clock today," that's not feasible. That does not work, that limits. You just removed all equity across your ability to provide for the adult learner.

And then the last thing I'd say, I wouldn't say it's a blocker, it was an opportunity. I try to look at everything as being half full. An opportunity that we saw was some of our internal policies, and how could we change? It took me a long time, by the way. It was like a personal knocking on doors, we're going to get this done. There were policies that we looked at and said, "These are barriers to entry for employees." Whether it be your background, there could be a number of reasons. So how do we remove those barriers? So we changed five of our internal policies to allow for employees to have the opportunity that they may not have even considered prior because they saw this in some way, shape or performance, being a blocker.

### **Abha Bhattarai (00:48:05)**

Perfect. Jocelyn, I'll go to you next. Walmart has more than two million employees all over the world, but a lot of this employee talent development is done at the local level or the regional level. Can you tell us a bit about how you balance those two things, how do you work within the community, but also in this larger national or international framework?

### **Jocelyn Caldwell (00:48:26)**

Yeah. I would say the way that we've done it is, you need to create local-based community solutions, as well as what I would call enterprise solutions that kind of meet in the middle. So what we found is that, oftentimes, when you start from the top down or the enterprise solution, you are designing for scale. So sometimes you're missing what that community has available, what that local market needs, and so you have to shift the paradigm a bit and start with what are the clubs and stores in certain communities? What are the roles? What are their needs? What are those associate needs?

And then I think Paul, you mentioned this, then what you'll find out is, there are many strategic partners that you can leverage within those communities, like workforce development partnerships that we've made, as well as those that are offering boot camps and apprenticeships, but they're not necessarily nationwide or across the United States. They tend to be within those local communities. So how can you develop your needs and conduct the needs analysis so that those local talent developers can consume it? And that's one of the things that we had to really work toward, and we are still doing that, so we can disaggregate the data and the demand such that we understand by location and community, what it is. So then we can better leverage those local community partnerships that we have.

Abha, I think you're on mute again.

### **Abha Bhattarai (00:50:16)**

Thank you. Paul, you talked earlier about how many businesses still aren't making these investments and they just haven't sort of come around to this. And I'm wondering if you could elaborate on that a bit.

Why is there a hesitation to invest in worker training development programs and what are some strategies around that?

**Paul Osterman (00:50:34)**

Right. So I don't think there are any businesses of any reasonable scale that do no training. The problem is, where is that training directed? And is it directed entirely at senior folks? Is it directed entirely at people with college degrees? Or does it go to a frontline workforce of various kinds? And then secondly, has the organization built job ladders? So again, to pick on the healthcare sector because it's a sector where there's tremendous opportunities for job ladders, because it's such a large hierarchical set of organizations, is it possible to go from the laundry or from the kitchen and become a healthcare technician? Have you built those kinds of ladders? So the real question isn't, how come they don't do any training? It's, to whom is the training director and what kinds of ladders are available?

Part of it is cultural or kind of ideological or conceptual, whatever word you want to use, namely kind of a lack of respect for what frontline workers could be or could do if they were given the opportunity. Partly is the lack of advocates within the organization. So who are the advocates within the organization? Well, traditionally, historically the advocates were unions, but unions are not in most organizations now. Other advocates could be a very strong human resource function, but now in most organizations, human resources is not a strong function. Frontline managers are interested in getting a job done today. So that's their orientation. You can understand that completely, but they're not necessarily interested in building talent over a long period of time in the organization. So there aren't strong internal advocates, and there aren't really strong, external pressures on organizations to change.

So this combination of cultural, I don't know the right word is, but I don't want to sound political, but cultural ideological, lack of respect for what people could do, lack of respect for the contribution they can make to the success of the organization combined with lack of advocates in the organization, combined with pressures for immediate performance and training is in long-term investment heads up to challenges.

**Kim Gregorie (00:53:07)**

Abha, can I chime in there for a second? Because I think too, Paul, there's this side there of, one of the things that we did to help bring it forward was, we started with leadership and really got their buy-in. But then after that, came in and started to marry, "All right, we have all these people and they're taking advantage of either internal or external resources to go and get fully funded degrees and or certificates," but then to say, "Hey, we're pointing them towards in-demand jobs within the firm that we know we have openings for." So how do you marry that data? And I think data has really been a gift to help us to drive more opportunities.

I also think that one thing we haven't talked about today that I was reminiscing as we were talking here about something that I spoke to a few years ago is, we give people all this training, but then we don't teach them how to go and get their resume updated-

**Jocelyn Caldwell (00:54:02)**

Yes.

**Kim Gregorie (00:54:04)**

... or how to do an interview properly, or how to show up and say, "Well, I learned this, and then here's how I applied that skill." I have a 17-year-old. He got a job over the summer, and he's coaching little boy in golf. He's on the golf team at school. He is coaching a little boy in golf. So I sat down one day and said, "Hey, what are the skills do you picked up?" And he looked at me like I had a third eye on my head. He's like, "What do you mean the skills I picked up?" I said, "Well, tell me what you do with Nicholas. Oh, you do that with Nicholas? Okay, so how'd you bring that forward and how would you talk about that and how is that changing?" And it was this conversation, but those are the kind of things we need to do in the workplace. I use that example because it is easy to talk about him. But it's important because if someone gets all these skills and they can't articulate it, it doesn't help them move forward, and that's on us to help them.

**Paul Osterman (00:54:53)**

I completely agree. But then the issue becomes, and I'm not saying this is a problem in your organization, who's going to do that? And that means, where is the organization going to devote resources to it?

**Jocelyn Caldwell (00:55:05)**

Yeah.

**Paul Osterman (00:55:05)**

So then the organization is, "Well, who's going to be resistant to directing resources towards it?" And remember, and you know this better than I do, the CEO can say, "This is a fantastic idea," but three levels down, it's somebody else who actually has to make it happen and be willing to direct resources towards it.

**Jocelyn Caldwell (00:55:22)**

Yeah. And Paul, if I could just... Abha, can I jump in?

**Abha Bhattarai (00:55:25)**

Yeah, of course.

**Jocelyn Caldwell (00:55:26)**

Yeah. So to jump into the conversation, that's why I think that we need to do a better job showing ROI. Kim, you make a great point. We have all of these openings. We've invested in our associates, but we are not matching the two. So if you think about the cost of a vacancy, the cost of hire, hiring externally, you can easily build. And we have built the business case that says, "Hey, we've already made this investment. Why aren't we leveraging our internal associates? Or we've invested, and now they have 80% of the skills that they made for this job. Why not take it to a hundred percent? Why not invest in their ability to build resumes, to communicate effectively in interviews, to give them that confidence so that they go through the process, we pull them through to the job? So I think measurement is key in terms of

return on investment, but then also understanding what outcomes you're trying to achieve. And you can't emphasize enough. It's not the training for training itself or development for development itself; it's the mobility, it's the movement of your employees or your associates afterward.

**Kim Gregorie (00:56:50)**

Hashtag #jobs, Jocelyn, hashtag #jobs.

**Abha Bhattarai (00:56:56)**

All right. Well, we'll go to audience questions in a moment, but before we close out the conversation, I want to ask each of you to talk about any policy or practice takeaways that we haven't already discussed, as well as any final reflections you may have to share with the audience. Daniel, we'll start with you.

**Daniel Bustillo (00:57:12)**

Yeah. Thanks, Jocelyn. I'm just going to drop in to build off the previous conversation because I think that certainly all the internalists at the firm levels really important. I think that there is a huge component to this conversation that we haven't touch upon today, but there's a narrative component related to the fact that there are some folks who are viewed as deserving and some folks who are viewed as undeserving. Here, in the context of this conversation, that is certainly part of this consideration. There's an entire policy component as well, too, related to the public workforce system not being oriented towards supporting good jobs, equity considerations.

And I think Paul certainly knows this from his healthcare work as well, certainly, if we look at where we have occupational growth in healthcare, we have large projected occupational growth amongst the jobs that are lower wage jobs as well. The solution to that is certainly not just, "We're going to train people to higher wage jobs," which we have less of necessarily sometimes as well. So there's a lot to unpack here on an ongoing basis. I think, certainly, we've talked about apprenticeship here. That's a piece of our workforce system. That's one particular modality. There's a lot of attention given to that, but I think there's certainly a lot of investment given to that as well too. But as Paul talked about, when you look at the total numbers, that's a relatively small slice of what happens in terms of workforce training as well.

And even with that, I mean there are many obviously good components of it. There are certain things that we need to pay attention to in the context of, there's been an uptake in the utilization of apprenticeship programs amongst some of these lower wage occupations as well. So are we simply using a different modality to reinforce the occupational segregation that really exists? I just think the intentionality behind what we're designing in building and what we're utilizing as centering workers is important in my estimation. So really appreciate the conversation today.

**Abha Bhattarai (00:59:09)**

Perfect. Kim, any final thoughts?

**Kim Gregorie (00:59:12)**

So I think that, two things, I'll speak from an internal policy perspective versus external. When I think about it, organizations need to continue to look at their hiring policies. They need to continue to look at the skills versus degrees within their job descriptions, doing job description reviews, proactively looking at internal talent, like we were just talking about between the conversation with myself and Jocelyn.

I think the last thing I'd say as the final thought is, we've had a strong focus on, how do we help the management at varying levels? Someone talked about at the top, we can get all the buy-in at the top. We spent a lot of time with those middle managers or leads to talk about why this is so important to help people continue to skill themselves so that they're ready for not only being better in today's role, but in the future. And some of it was removing some of the policy that made it approval the managers were making. So remove manager approval. To participate in programming, there's no longer a manager approval.

This is a benefit. This is available. This is an opportunity for employees to cross the firm to continue to better themselves and their skills and their abilities to show up every day. So we manage our engagement. And that word alone made it about, how do we bring together the manager, leader, and employee together to talk about as a part of not just, "I'm going to go take advantage of this program," but, "Hey, as a part of my annual performance view, I want to have this be a part of it because I am trying to better myself and we should talk about how you're going to help me as my leader to have this be a part of my development, and so I continue to get better." And we talk about that a lot.

**Abha Bhattarai (01:00:51)**

Jocelyn?

**Jocelyn Caldwell (01:00:54)**

I agree with what both Kim and Daniel have said in terms of closing remarks. The only add that I would have is, I think that we just need to bring to life some of the disparities we're seeing, some of the inequities that we're seeing by putting the data and analytics in place where it becomes a little bit more transparent and it's more dynamic and we can share it. Now, Paul, to your point about having to create your survey, and there's not much data out there. So at the end of the day, it's hard to voice what we're seeing if we don't necessarily have the evidence and the data. So that's the only additional point that I would make, is data plays a key role in this discussion to shed light and illuminate some of the points that we were bringing out today.

**Abha Bhattarai (01:01:50)**

Fantastic. Paul?

**Paul Osterman (01:01:55)**

No, I mean, I would say two things. One is, I think that the panelists have been very sophisticated in talking about how you deal with internal obstacles. So for example, at the high level of abstraction, this issue about, do you need a supervisor's approval to do training? No one ever mentioned that. Right? I mean, that kind of question doesn't show up in the literature, and it's obviously very important.

Getting down, and again, I don't use the word weeds in a pejorative sense, but getting down into the details of how organizations are structured and organized and figuring out that point, I think, is very smart and very useful.

I do think that the public sector has punted the amount of public resources that have gone into training have declined over time. And the thing is that good training programs, I think as Jocelyn mentioned, can partner with organizations by providing both a pipeline into the organization, but also helping organizations support and adopt best practice for internal training. But those external organizations need support. We know what best practice looks like, but best practice has to be supported through resources.

### **Abha Bhattarai (01:03:16)**

Fantastic. Daniel, you talked a bit about who's deserving and undeserving of these programs, and I wanted to use that as a transition into the audience questions because we've had a number of questions about how to use apprenticeships or work-based learning to help people with disabilities succeed in their careers, or maybe non-English speakers sort of move up in the corporate world. And I'm wondering how we can level the playing field for people who might not have the traditional backgrounds that we think of.

### **Daniel Bustillo (01:03:47)**

That's an important consideration. I mean, I know that there's federally a whole bucket of work related to increasing access for people with disabilities, as an example, and apprenticeship and making those more inclusive and accessible as well. I think that's really relatively nascent work still and there's a lot to be figured out there, but I know that is something that is a federal initiative. I really appreciate lifting up the language as well too, because I think certainly a big consideration for us. The workers that we work with, many, many immigrants, many different languages as well. In the context of the work that we do, it is really important for us and our partners to localize services. So training is provided across a range of different languages as well. That is not the norm per se. It is certainly the expectation that if you enter a training program, it is given in English and that you speak English, but that is not the tack that we take.

Now, that requires a whole level of resource, as Paul pointed out, and infrastructure support as well. That is certainly not typical or the norm as well. But I do think it is really important if we say we need to take a step back and say, "Listen, what we have done has not worked for many people to this point." So we need to reconfigure what it is that we're utilizing and what we're working towards as well. That is part of that process. As difficult as that work is, it is something that needs to be core to what we're working towards.

### **Abha Bhattarai (01:05:22)**

Kim or Jocelyn, would you like to chime in? Okay. All right. Another question. Can panelists talk about how skills development addresses and doesn't address job quality and the large number of low-quality jobs that we have? What else do we need to be doing alongside these skills investments?

### **Jocelyn Caldwell (01:05:45)**

I think it's part of your overall workforce strategy. And of course I would say this, but you need to conduct job analysis, and you need to think about your associates as well as your business, as you're doing that. And understand, are we still keeping around jobs of yesterday versus recreating them for the

jobs of tomorrow that are high quality, that are of higher quality? I think oftentimes organizations shy away from that, and they have these legacy jobs that are existing and are not thinking about not only upskilling their workers, but what I call is upskilling their jobs to go along with it as well.

**Kim Gregorie (01:06:36)**

The other part of that, I think, that's important too and couldn't agree more, and there's a ton of architecture work that I know we've gone through in the last couple of years, but really looking across some, if you call it something over here and you call it the same thing over here, there should be equity across in.

**Jocelyn Caldwell (01:06:49)**

Yes.

**Kim Gregorie (01:06:51)**

But I also think that one of the things that Paul talked about are the ladders or having these journeys for people. So something that we've been trying to do is connect for someone. If I'm A and I want to be in role B, and I'm just clearly using hypothetical, if you assess yourself on the skills and if we've done the architecture on that other role, which we've done it for over 500 of our roles, it then can marry together and say, "Hey Kim, you're in this role. You're looking and wanting to be in this role. Here's some of the skills that you're going to need to get. Here's learning that can help you or suggested things you should be doing to get there." So that helps someone to create that pathway. It's also difficult when you're in that frontline role to understand where should I go and what is the path I should take and how do I get there?

**Abha Bhattarai (01:07:41)**

Great. We have an audience question about work-life balance. And I know that's something a lot of employees and employers have been contending with over the last two years. I'm wondering how that fits into all of this. How do you prevent this from being, you have a full-time job and now you're doing training on top of that, you're doing workplace skills development? And how do you keep from getting overwhelmed and still having that right balance?

**Paul Osterman (01:08:04)**

If I could comment on that as speaking as someone who has no work-life balance. I link it back to the earlier question. First off, there's something that we haven't talked about, which is that people should be paid while they're in training. I don't know whether that's issue that applies to anyone on this panel, but certainly other organizations, if you ask them what they do in terms of training, "Oh, we provide a tuition reimbursement program, but by the way, you're doing it on your own time and you're not being paid."

The earlier question had to do with job quality and low wage jobs. I've spent most of my career, a lot my career, thinking about training issues and working on that topic. But it's easy to forget that training's not the only tool in the shed in terms of improving job quality. There's other ways to think about job quality and upgrade in quality of work that's not about training. It has to do with compensation. It has to do with employee voice. It has to do with scheduling legislation around predictable schedules. There's a lot

of different ways to talk about improving job quality training. Job ladders are certainly important, but they're not the only thing to think about on that broader topic.

**Daniel Bustillo (01:09:32)**

I'd like to just jump in real quick on both of those as well. I appreciate what Paul just slipped it up in both contexts. I think that was fundamentally originally why we were interested in registered apprenticeship. You heard me mention the fact paid job from the beginning. It was based upon the experience of healthcare workers. I've met one, many healthcare workers over the year, one in particular was describing to me a typical pathway that we put out there, CNA to LPN, require this individual... The training facility had to be in person, it was located two hours away from them. Had two small children. It was five days a week, full time. So they had to work two double shifts in a nursing home on the weekend, go to school five days a week. That is an unsustainable. We put far too many people in that situation. That is not a recipe for success or sustainable. And that's not fair to have that as the expectation, that this is what folks most do.

In the context of the second question, I mean, I would say that we have far too long progress on the path where we have predominantly focused on training and skills development as the sole option for accessing a quality job. And I think that certainly, Paul has done a lot of work with home health aides. And I think Paul rightfully would say that that is not, perhaps I'm wrong about this, but to me, training is not the primary mechanism towards improving the quality of those jobs necessarily. Even if we are saying to people, access is a training pathway, we still have a great need for home health aides in this country. So what does it mean for those folks who are not able, or do not want to access those pathways, but they choose to be CNAs or choose to be HHAs? They should also have a right to a good job as well.

**Abha Bhattacharai (01:11:20)**

Perfect. One final question for you, Paul. A viewer asks, what's the evidence for how employer-sponsored testing helps workers and businesses? What are some of the data that we do have on how this can all benefit companies and individuals?

**Paul Osterman (01:11:36)**

Employer-sponsored training, did you say?

**Abha Bhattacharai (01:11:39)**

It says testing, but I think it must mean training. Yes.

**Paul Osterman (01:11:43)**

Right. There's basically two sources of evidence on this. One is the internal ROI studies that Jocelyn referred to, which some organizations have done. While there's no good data on, other than my survey, on the kind of incidents of training across the whole economy, there is data on, for example, the National Longitudinal Survey of young people, which was done in two different waves. There's what you would call special purpose surveys, in particular industries, of people who receive training that tracks people over time. All of which shows econometrically, statistically, that people who invest more in

employer-provided training are more likely to receive higher wages and are more likely to be promoted.

Now, given to a little jargon here, there are selection issues. I mean, you worry that the person who receives training is also someone who would succeed for other reasons, other than the fact that they receive training. But the best surveys find ways to deal with those selection problems, and I think that there'd be no debate that if you take two observationally, identical individuals working in the same organization, one of whom was injected with six months of good training and one of whom wasn't, the person who was injected with a training would do better in that organization. I think that the evidence is quite strong on that.

**Abha Bhattarai (01:13:23)**

Well, thank you everybody for joining us. And with that, I'll bounce it back to Maureen.

**Maureen Conway (01:13:30)**

Thank you, Abha, and thank you everybody. Thank you, Paul, Kim, Jocelyn, and Daniel. What an amazing conversation. This has been a lot, honestly, to keep up with, I feel like. Between the chat and the conversation and the Twitter, this has been just fantastic. Thank you all so much. I also want to thank my colleagues, Matt Helmer, Tony Mastria, Adrienne Lee, Victoria Prince, Amanda Fins. It takes the whole village of us here at the Aspen Institute to put these things together, and so really want to appreciate them in their hard work in doing this.

Many thanks to this audience. What a great audience you have been, and really appreciate all the engagement, comments, questions. That was just fantastic. Please stay tuned for more information on our next conversation in this series, that we'll explore how we design jobs to include and align with employee ownership. I think that's going to be a really interesting topic, and we have some great speakers we're reaching out to. So more on that soon. Thanks for joining us today, everybody. Hope to see you again. Bye-bye.