

**The Citi and Gateway Community and Technical College Strategic Partnership  
2014 Bellwether Award**

**Submission to the Southern Association of Community, Junior and Technical Colleges Journal**

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**ABSTRACT:**

This paper describes the Citi and Gateway Community and Technical College partnership created to enhance workforce and economic development. With emphasis on the strategic planning process, which began in 2003, service components are outlined including pre-hire training, a special career coaching course – Career Discovery, an academic advisor on site in the Gateway Center and college courses leading to certificates offered on site. Also included in the paper are numbers of employees served, evaluation methods and program replication.

**NEED FOR THE PROJECT:**

Dr. G. Edward Hughes, Gateway Community and Technical College President and CEO, and Mr. Gregg Morton, Citi Site President, met in the summer of 2002 for breakfast and discussed the fact that Citi wanted to use education as a business strategy to increase the company's leadership development for the employees and the community. Dr. Hughes noted that as a newly founded college in 2001, Gateway leaders wanted to pursue strategic partnerships with top tier companies to reach a larger base of students and to fulfill its mission as a premier training institution in the region which would improve the economic vitality of the region. From that breakfast meeting it was decided to move forward with a brainstorming session with representatives of Citi and Gateway to study the feasibility of creating a strategic partnership.

Dr. Angie Taylor, Vice President of Workforce Solutions, met with Mr. Morton in late August of 2002, and he provided an overview of Citi in Northern Kentucky and their business needs. That very important meeting was held in the "war room" at Citi, and Mr. Morton was very clear about the fact that he wanted to share the good and bad at Citi and their goals to increase employee effectiveness through education. He noted that over 80% of the employees did not have a degree and their turnover rate was high for a call center. He described how he wanted the Florence, Kentucky, Citi Call Center to be number one in the country and he wanted the employees to embrace not only their work but their community. His commitment to civic duty was impressive, and while touring the facility, it was noted that with over 1,500 employees on-

site, Mr. Morton called everyone by name and received positive remarks from the employees. Featured throughout the building were fundraising activities and the camaraderie was high. It was evident that Mr. Morton was well respected and obviously well-liked by everyone at the site.

After that meeting, Mr. Morton matched Dr. Taylor with Dr. Tim McCarthy, Human Resources Director for Citi, and requested that further study be conducted concerning the details of Citi employees, the nature of the work, the culture of the company and bottom line, what made the call center tick. In an effort to learn more about the work in a call center and to assist with their hiring demands, the college conducted ACT Job Profiles for three positions at Citi to determine the skills and duties of the work and to provide pre-hire skill levels to be met through Work Keys testing. This allowed the Gateway Workforce Solutions team members to more clearly understand the demands of the jobs at Citi. The three positions profiled through the ACT process included Customer Service Representative, Collections Associate and Banking Financial Associate.

By December 2002, the following needs were determined by the team:

1. Education strategies that would increase the skills of the employees through career planning, customized training, and college credentials.
2. Educational training that would decrease their attrition rates.
3. A method for “coaching” employees to get through the academic maze of college enrollment, registration, financial aid, and credential completion.
4. A program model that would encourage employees to prepare, seek and obtain advanced leadership positions within Citi.
5. A program that would impact the workforce, community and economic development of Citi, Gateway and the region.

For the team, many questions remained. Could we have a positive impact on a call center culture that faced constant hiring need based upon high attrition? Could we increase the Gateway footprint in Northern Kentucky by taking college to the corporate environment? Could education really become a business strategy that created a WIN for the company, the employees and the community? Could workforce development move from theory to action and become a catalyst for community and economic development in other companies in the region?

#### **THE HISTORY OF THE PROJECT:**

Following early explorations and discussions noted previously, the core senior leadership for the partnership determined that an implementation phase would begin in 2003. Both partners recommended significant leadership talent to the implementation team, and the initial charge to this group was to plan the activities that would be executed to meet the needs identified.

In January of 2003, the planning team was created with 12 Gateway faculty and staff members, 10 Citi employees and a representative from the Northern Kentucky One Stop and the Northern Kentucky Chamber of Commerce. Dr. Taylor from Gateway and Faith Kenney, Communications Director at Citi, provided the leadership to the team of 24 over the next five months. Dr. Hughes and Mr. Morton charged the team at the initial meeting and committed the respective organizations' resources to the initiative. The leadership commitment at this early stage was one of several key elements that provided legitimacy and urgency to the partnership. The team met twice a month creating a training plan and program components to serve the employees at Citi. From those planning meetings the following four program components were created.

## **INITIAL PROGRAM COMPONENTS:**

### **1. Pre-Hire Training:**

For those taking Citi's pre-hire testing and failing to achieve a passing score, the team created pre-hire training to help them prepare for a second pre-hire testing event. During that training Gateway staff from the Adult Education Department worked with potential new hires preparing them to take Work Keys tests to obtain the Kentucky Employability Certificate, which is now the National Career Readiness Certificate. The Work Keys skill levels were set through the ACT Job Profiles that were conducted with the Citi employees acting as subject matter experts. The three ACT Job Profiles included Customer Service Representative, Collections Associate and Banking Financial Associate. The Pre-Hire Training Program was in place through 2006 when Citi changed its pre-hire testing and no longer needed to prepare candidates for the pre-hire testing. One of the most outstanding outcomes from this program component was the fact that if the candidate did not pass the Citi pre-hire testing after the second attempt, the person did have a Kentucky Employability Certificate and could take that credential to other companies to seek employment. The positive outcome was a bonus to the community and the job seeker.

### **2. Career Discovery:**

Career Discovery was created to help Citi employees create plans for their advancement within Citi and create their future career pathway maps based upon career research including their aptitudes and abilities. There are approximately 18-20 Citi employees in every Career Discovery class and participants must fill out an application for the program and have their manager's recommendation. Once selected for the program, the participants work with a trainer from Gateway and a trainer from Citi who team-teach the class. While the specific outcomes of this program are summarized in the Measurable Effectiveness section of this report, it should be noted that 946 Citi employees have completed Career Discovery and each has received college credit for the program. When the graduates stand to deliver their "elevator speeches", the audience of managers, Gateway faculty and staff and often guests from the public, are impressed and eager to discuss career advancement opportunities with these Career Discovery

graduates. Since one of the critical needs identified by the team included developing internal leadership capacity, a positive outcome is that 331 graduates have experienced at least one grade level increase promotion and many are in formal leadership positions within the company.

### **3. Academic Advising On-Site:**

As a part of the initial programming, Gateway placed an academic advisor on-site. The academic advisor helps employees with all types of advising challenges. It should be noted that approximately 1,000 people per year are served with academic advising services and the academic advisor also helps employees enroll at other local colleges and universities when the need arises. For instance, when a Citi employee completes an associate degree, he or she will be referred to local universities to pursue the bachelor's degree. Our academic advisor will act as the bridge between Gateway and the educational institutions, assuring that the employee is successfully linked to the next academic credential obtainment. Further, the academic advisor also works with employees who have completed some college courses or an associate degree and need to enter a local university to complete their bachelor's degree. Therefore, the academic advisor is the life line for the Citi employee in that matriculation process. The academic advisor assists with the application process, financial aid, using the Citi tuition reimbursement plan, and the registration process. Please note that the Citi employee may meet with the academic advisor to obtain assistance with the career planning process prior to applying for college. The time savings to the employees plus the advising services are a definite win for Citi employees. Our academic advisor, Heather Morgan, has been at Citi for ten years and also teaches in the Career Discovery program. This dual role allows the academic advisor to introduce the advising process and the services available through the Gateway Center, which is located next door to the Citi cafeteria. There is a constant stream of Citi employees working with the academic advisor, and the Center also features a computer lab where employees may fill out their applications, etc. It is an impressive setting, and Citi employees make good use of the services and Center.

### **4. College Courses Offered On-Site:**

Because the overall need identified by Citi leadership focused on the need to increase the college attainment of employees, Gateway began offering college classes on site. The college continues to offer a number of courses at Citi today and has been joined by other institutions, thereby making the attainment of advanced degrees possible. Many employees have taken their first college course on-site at Gateway and often these employees were graduates of Career Discovery. By offering college courses on-site at Citi, employees have the opportunity to walk down the hall, take a college course and return to their desks, saving a tremendous amount of time. Further, they receive the support of their managers and colleagues who can offer direct assistance and care with the challenges first college courses provide. This is a great starting point for first time college students. Lastly, often Citi employees plan their college courses around their work content, taking course that help them with the challenges of their work. Often, Citi employees are heard saying that college courses have helped them be more

effective at their jobs, and this is a most positive outcome. As the first community corporate partner to offer Gateway courses on-site, the faculty had the challenge of obtaining accreditation permission to actually offer courses at Citi. Then they faced the challenge of Citi's many work schedules and the best time to offer these courses to meet employees' schedules. These courses have been offered morning, noon and night, as well as weekends, to meet those demands. At the beginning of this partnership, Citi employees were surveyed to determine the courses that would be of most interest to the employees. This survey information was used to determine the first course selections. Further, we offer tutoring services for those facing academic challenges. One of the most outstanding moments of our history was when the first Citi employee crossed the stage at graduation. To see that Citi employee's children was a true highlight for faculty, staff and Citi leadership. Now, when one walks through the Citi site, there are posters everywhere with Citi employees' pictures noting their successful completion of a college degree. It is exciting to see Citi employees showcased through these huge posters, which are very motivational for others who seek to achieve the same level of accomplishment.

#### **CONTINUATION OF PLANNING AND EVALUATION:**

While the initial implementation team membership has changed over the years, a core leadership team still works to stay abreast of needed changes in programs and services. For example, in 2006, the Pre-Hire Training program was discontinued, because there was no longer a need for the program when the hiring process at Citi was changed. Secondly, continued evaluation of programs and services allow us to measure effectiveness and decide whether or not to continue the programs services for Citi employees. An example of that decision involved Career Discovery, which still exists today, because it is extremely relevant to the employees who aspire to move up into management positions within Citi. These employees want to plan their career pathway maps, and Career Discovery provides that opportunity. One change for Career Discovery, however, was the reduction of training hours for the class. Trainers and coaches now utilize guided activities outside of classroom time in order to increase the breadth and experiential nature of the learning. The inclusion of job shadowing while enrolled in Career Discovery is an example of an out-of-class activity. Further, it became apparent after offering three years of college credit courses at Citi that there was a need for a certificate program at Citi allowing employees to obtain a college credential on-site at Citi. The planning for the certificate took six months, and the first certificate program was offered in 2007. Over the years the partnership team has assessed the changing needs of the employees and the company, and as a result additional program components have been identified and implemented as described below.

#### **1. Operations Management Certificate:**

While continuing to meet with managers to study the effectiveness of our partnership and think about new services to create through the partnership, it became apparent that an Operations Management Certificate would be very helpful to those who aspired to move from front line customer service positions in the call center to a unit manager position. The creation of the certificate took approximately six months, and all of this work was conducted in 2006.

The first courses for Operations Management were offered in 2007 on-site at Citi. The curriculum for this new certificate program, which is embedded in the Gateway Business Administration associate degree is included in this packet of material. What the team quickly learned was the positive impact many employees reported after completing a college credential. For many the first success in a college course or certificate became the motivating factor for them to pursue an associate degree and a bachelor's degree. The Operations Management credential has had a very positive impact on the career advancement of employees, and it is always powerful when colleagues encourage others to pursue the credential, as well. Many companies in the region now use the Operations Management Certificate along with other college credentials for their career advancement programs. This replication in our region enhances the economic development for companies and employees.

## **2. Customized Education and Training:**

Gateway has also offered customized training for employees at Citi. At the mid-point of our partnership in 2008, the leadership at Citi asked Gateway's Workforce Solutions team to create training that would be customized to their specific training needs and could be delivered in short-term sessions. Based upon employee performance and evaluations, it was determined that there was a need for a more focused rapport with call center customers, and the training would need to provide a method for employee use that would allow them to establish a better rapport with their customers. Knowing the nature of the call center and the fact that every minute counts when serving a customer, the goal was to create a customized training program that would help employees increase their rapport with the customer and still provide service in a timely manner. A course was developed, Establishing Rapport with the Call Center Customer, and field tested with the leadership prior to delivery. The course was found to be very valuable in increasing rapport with customers, and a second course was designed to focus on negotiation skills. The Enhancing Negotiation Skills with Call Center Customers course was delivered to help employees learn the art of negotiation while still meeting the time parameters of the call center. Over 800 employees have taken this training and found it valuable in their daily work. Due to the success of this training, other customized classes have been provided.

### **CONTINUATION OF PLANNING AND EVALUATION:**

In 2012, The Leadership Team identified a need to provide more customized training, and, based upon the success derived from college courses, a college credit certificate program and other customized training, it was determined that customizing a sales certificate to provide college credit would be an advantage to many Citi employees. Further, Citi employees had also participated in strategic planning at Citi, and their primary values were focused on Client Excellence.

The Client Excellence Values included:

- Serve our Clients with Excellence – Be Accountable and Dependable

- Be a Team Player – Demonstrate a Passion for Winning
- Be a Brand Ambassador – Be Bold and Curious
- Act in the Best Interests of our Clients and our Communities - Embrace Growth and Learning Opportunities
- Act with Integrity - Think and Act Like an Owner

With these values in mind, the leadership team decided to move forward with customized training that reinforced these Citi values.

### **1. Client Excellence Certificate – Sales Certificate:**

A customized course of study reinforcing the corporate Client Excellence Values was planned for the Citi employees. Through the needs analysis process, it became apparent that Gateway's Sales Certificate encompassed many of the competencies required to master Client Excellence at Citi. The Gateway Sales Certificate includes the following courses:

- BAS 155 Personal Selling
- COM 252 Interpersonal Communication
- QMS 201 Customer Service Improvement Skills
- BAS 291 Retail Management

Development soon began to integrate the corporate values into these courses, and the Citi Client Excellence Certificate – Gateway Sales Certificate was established. Internal marketing used verbiage more native to the company and illustrative of the career connection. The Citi language re-titled the courses in the following manner:

- BAS 155 The Universal Business of Brand Ambassadorship – Personal Selling
- BAS 291 Managing Client Interests – Retail Management
- QMS 201 Cornerstones of Client Excellence – Customer Service Improvement Skills

The first iteration of the Client Excellence Certificate Program was completed in December of 2013 and produced eighteen graduates, seven of which also received the full Gateway Sales Certificate after combining their work with previous academic credit gained for COM 252. The remaining eleven graduates will be given the opportunity to complete COM 252 beginning in February of 2014 so they may also obtain the Gateway Sales Certificate. A second iteration of the program with a new cohort of Citi employees will also begin in 2014.

### **2. Needs Based Coaching:**

Further customized training courses are being offered at Citi based upon the leadership teams' analysis of employee training needs. Using the Achieve Global Needs Based Coaching Series, Citi employees are provided a coaching framework and key actions that support the internal

motivation of employees and maximize the performance of work groups. The content of the training includes the following class titles:

- Shaping a Motivational Workplace
- Giving Needs Based Feedback
- Realizing Talent in Others
- Offering Rewards and Recognition

This customized training opportunity provides 14 hours of instruction, and 27 people have participated in the training to date.

Further, the Strength Finder 2.0 tool has been used to help leaders identify their individual areas of personal talent with the greatest potential for building strengths.

### **RECOGNITIONS THROUGHOUT THE PAST TEN YEARS:**

In 2004, the Citi and Gateway Partnership was selected as a Bellwether finalist for the Workforce Development award by the Community College Futures Assembly. While we did not take first place, we were honored to be selected to present at the conference and learned from our colleagues about ways to create and implement a sustainable training program through our public private partnership. Secondly, Citi was the recipient as the number one corporate partner in Northern Kentucky in 2006 from the Northern Kentucky Council of Partners. In 2010 the Kentucky Community and Technical College System Board of Regents selected the Citi and Gateway Partnership as a featured showcase at the annual Board Meeting. Crystal Gibson, Vice President of Communication and Public Affairs, and Dr. Taylor, Vice President of Workforce Solutions and Innovation, made a formal presentation to the Board showcasing the program and the measurable outcomes accomplished to date. In 2010 members of the Partnership Team including Dr. Hughes and then site president Joe Martin presented the partnership to the new CEO of Citi (worldwide) during his visit to the Citi Florence site. In September of 2013, Ms. Gibson made a presentation to all of the Site Presidents at Citi Call Centers throughout the US concerning the Citi and Gateway Partnership. Following her presentation, she received several calls asking questions concerning replication.

### **MEASURES OF EFFECTIVENESS:**

The measures of effectiveness are outlined in the packet of materials. Some of that information has been integrated into the program component descriptions as well. Career Discovery has served 946 employees and 331 have received at least one grade level increase promotion. There are approximately 1,000 employees served annually with academic advising services. Over 800 employees have taken customized training courses with Gateway faculty members. Over 1,800 employees have taken college credit courses at Gateway. Many other employees have been guided to take college courses at other educational institutions with the assistance of the academic advisor. Forty-three employees have completed the Operations



Management Certificate, and 18 employees will complete the Sales Certificate during the spring 2015 semester.

**REPLICATION:**

The replication opportunities for the Citi and Gateway Partnership are many. In 2005, the Greater Cincinnati/Northern Kentucky international Airport decided to replicate the program providing the opportunity for its 10,000 employees to take advantage of an academic advisor on-site and participate in Operations Management courses leading to the certificate. The college has eight years of very successful programming at the airport. Furthermore, numerous companies in the Greater Cincinnati/Northern Kentucky region, including major international companies such as Mazak, Staples, Cengage Learning and others, have now used college certificate programs onsite for their employees throughout Northern Kentucky. The college is working closely with Amazon as it studies the feasibility of implementing the Citi and Gateway model at its distribution center in nearby Hebron, Kentucky. Gateway and Citi are exploring the replication of the partnership programs at a center in Florida to be implemented later this year. Other Citi sites currently replicating this program include Tucson, Kansas City and Albuquerque.