

# BRIDGING THE GAP BETWEEN TALENT AND OPPORTUNITY

**An apprenticeship playbook to help  
companies address skills and training  
gaps to provide under-represented  
groups access to professional jobs.**



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# The Apprenticeship Opportunity for Professional Roles

The U.S. Department of Labor estimates that there are 7 million job openings in America and only 6.1 million available workers—the first time on record the number of openings has exceeded the number of unemployed.<sup>1</sup> The issue is not availability of jobs. The issue is skills—many, if not most, of available workers are lacking the right skills to fill open jobs.

We have a part of the solution. Professional apprenticeship programs can help address the skills gap facing most companies, provide greater opportunity to people who are under-represented across industries in the innovation economy and reskill those whose jobs have been—or will be—disrupted by technology.

Apprenticeships present companies with a unique opportunity to address the talent needs in their organizations using highly diverse, nontraditional sources. An apprenticeship serves as an alternate on-ramp into a role that normally requires a specific degree or professional experience by providing motivated, high-potential individuals with the required training, professional skills development and experiential learning to bridge the gap.

There is a large volume of highly capable and eager talent that has not completed a degree or does not have extensive professional experience for a variety of reasons, including their financial situation, lack of access to higher education or professional jobs, and timing. An apprentice model provides an engine to greatly expand the potential candidate pool while providing career opportunities to individuals who would otherwise not be qualified for the role and may not have access to the role through other channels.

Apprenticeships also are an important vehicle for helping individuals reskill or make a mid-career switch. As technology continues to disrupt industries and change the talent requirements, there is a growing need to establish a strong foundation supporting apprenticeships for professional roles.

Apprenticeship programs drive workforce development and create economic opportunities in the communities in which we work and live. They also help deepen relationships for the companies that support them, building a tighter link to the community. While apprenticeships can be used across a wide variety of industries, including both trade and professional positions, this playbook focuses on key steps, considerations, examples and case studies for apprenticeships in professional positions.

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<sup>1</sup>U.S. Department of Labor, Bureau of Labor Statistics, “The Employment Situation—October 2018,” <https://www.bls.gov/news.release/pdf/empst.pdf>; U.S. Department of Labor, Bureau of Labor Statistics, “Job Openings and Labor Turnover Summary”, <https://www.bls.gov/news.release/jolts.nr0.htm>

# Executive Summary

## 1. What is an apprenticeship?

Apprenticeships are defined as “earn-and-learn” programs that combine formal learning (e.g. in-person, virtual or computer-based training) with on-the-job training experiences. They provide the candidate with the training and mentorship needed to develop proficiency in targeted business and technology areas, supplemented by soft skills to augment the individual’s performance and ready them for success. Apprentices should earn a wage during the program and, upon successful completion, have the opportunity to convert to full-time employment with the sponsoring company.

Apprenticeships can vary in length and focus depending on the nature of the business and the requirements of the roles. For example, highly complex roles may require longer programs with more formal learning to build the necessary skills. Less complex or more transactional roles may require shorter program lengths, have limited formal learning and allow for a quicker ramp to proficiency. In all cases, the type of program should be targeted to the specific needs and requirements of the role. See Figure 1 for considerations on program length.

Figure 1: Apprenticeship Role Timeframe

PROGRAM TYPE	DESIRED OUTCOME	CURRENTLY AIMED AT	CANDIDATE BACKGROUND
<b>Short-Medium Term</b> <i>1 year or less</i>	Focus on building functional, technical or industry proficiency (e.g. capability in a specific technology or industry skill)	<b>Short term:</b> Transactional roles with minimal basic hiring requirements (e.g. call center, office admin)  <b>Medium term:</b> Roles requiring depth of knowledge in a narrowly defined functional, technical or specific industry process area	<b>Short term:</b> Little to no experience required  <b>Medium term:</b> Achieved or working toward a two-year associate degree, coursework in relevant focus area or nonprofit “boot camp”
<b>Long Term</b> <i>Average of 2+ years</i>	Provide training and work experience for a complex role	Roles that require immersion in multiple facets of the function, technology or industry requiring broader skill sets with deeper training	Achieved or working toward a two-year tailored associate degree, coursework in relevant focus area, or nonprofit boot camp with advanced trainings

## 2. Why apprenticeships?

A robust apprenticeship program can provide your company with numerous benefits, including:

- Access to a highly motivated and productive talent pool that is less likely to leave than talent from traditional sources<sup>2</sup>;
- Ability to provide under-represented groups greater access to innovation-economy jobs;
- Flexibility to source talent all year long vs. the cyclical nature of traditional degree sources;
- Ability to drive workforce development and economic opportunities where we work and live, including reskilling for people whose jobs are disrupted by technology-led innovation; and
- Ability to build deeper relationships with clients and the community.

## 3. How do you get started?

At a high level, there are four key steps to establishing a program. These are: **defining the vision, identifying opportunities, determining and executing the model, and evolving and scaling the model.**

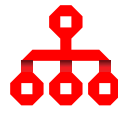
Figure 2: Key Steps to Establishing an Apprenticeship Program



**DEFINE  
VISION**



**IDENTIFY  
OPPORTUNITIES**



**DETERMINE AND  
EXECUTE MODEL**



**EVOLVE  
AND SCALE**

In **defining the vision** of an apprenticeship model, your company should identify the priorities it wants to achieve using apprenticeships, such as expanded talent sources or community development. You should confirm the vision with leadership and key stakeholders and use research on existing, established models to inform your program.

After establishing the vision for your apprenticeship program, you should work to **identify specific opportunities by role and location**. Consider what roles and locations are best suited to the program's goals. Apprenticeship roles should fill actual talent demands and present the opportunity to successfully equip an apprentice to fill that demand through skills-based, on-the-job learning and training. When identifying locations for apprentice roles, companies should consider strategic locations with local leadership support.

Your company should next work to **determine the program model** to be used in executing and delivering apprenticeships. These include considerations such as:

- Identifying candidate sourcing options
- Defining your interview process
- Defining the compensation model
- Determining the type and length of training needed
- Defining support model for apprentices
- Defining potential career paths upon completion
- Defining feedback loops to discuss performance

<sup>2</sup> U.S. Department of Labor, "Apprenticeship Toolkit, Advancing Apprenticeship as a Workforce Strategy,"

<https://www.dol.gov/apprenticeship/toolkit/toolkitfaq.htm>

Ultimately, you will need a conversion process by which you determine if you will offer the apprentice a full-time position upon completing the program, along with their onboarding process.

As each group of apprentices completes the program, you should look to actively evolve, improve and scale the program. Leverage lessons learned to enhance the speed, cost and effectiveness of future programs. You should also consider what additional roles and locations to target next and build additional programs based on what you have learned from each previous iteration. The ability to improve and streamline the process will be critical for continued success and to allow apprentices to become part of the fabric of how you source and hire employees going forward. Finally, with an established apprenticeship program, work to build an apprenticeship network to share and accelerate best practices with other companies.

### Keys to Success

For a program to be successful, it needs to have three key elements (see Figure 3)—a real need for talent in the organization, a supportive environment (including leadership support and infrastructure) and strong partnerships to help source and potentially provide training for apprentices.

**Talent Need:** Apprenticeships should address a real talent need in the organization to be sustainable and successful. They should not require the creation of incremental roles. In addition, the roles targeted for apprenticeships should have the potential to become part of the operating fabric of the company, embedded into the recruiting strategy over time in an industrialized fashion.

**Supportive Environment:** Leadership buy-in and support is critical to success. Locations should have strong local leadership commitment to support, manage and staff apprentices, along with a team structure that supports higher touch, day-to-day shadowing and professional development. In addition, locations for the program should be determined based on scale—there should be enough need for the role to have multiple apprentices start and work together for support and community building.

**Strong Partners:** Successful programs will include strong partnerships with educational institutions and nonprofits to source talent, provide training when required, and provide access to qualified candidates. Seek out partners with curricula or potential candidate populations that offer applicable skills to prepare them for apprenticeships.

Figure 3: Key Elements of an Apprenticeship



## **Organizing for Success**

Standing up an apprenticeship program will take time, effort and an investment. Creating a central team to help guide and support the program is typically required to help with leadership coordination, buy-in and overall program design and oversight. Ideally, the team is composed of a combination of Human Resources (HR) and business representatives. In addition, having a steering committee can help ensure unity in vision and direction and can address challenging questions that may arise. Location-specific teams may also be needed to design and coordinate activities on the ground associated with individual roles. These can include a local business sponsor, dedicated recruiter, training lead and program manager who will help drive the design and execution of the program in the location. Over time, the role of the central team will diminish as the overall design phase and initial implementation phase ends and local teams will become streamlined as activities become industrialized and embedded in existing processes and functions.

## **Cost Impact of an Apprenticeship Program**

As with most programs, there will be costs associated with establishing an apprenticeship program at your company. The main categories of cost relate to the initial creation of the program vs. the ongoing run costs. Initially, you will need to consider the additional costs related to designing and standing up the program. These may include the cost of a centralized program management team, leadership time, investments in establishing sourcing and training relationships, creating or editing a curriculum and time developing the relevant processes. Run costs will include items such as ongoing investments in training time, potential sourcing fees for candidates, recruiting costs, productivity impacts for apprentices as well as for coaches, mentors and others involved in the program, and the impact of any apprentices that leave the program or ultimately do not convert successfully after the program.

The offset to some of this cost is the potential salary differential for an apprentice. Given the fact that apprentices will require investments in training and on-the-job learning and they may initially be less productive, the base pay rates typically will be lower than a non-apprentice filling the end state role. This differential should be enough to offset the investments making the run rate economics neutral. In addition, the anticipated added benefit of higher retention in the apprentice population after the completion of the program will be further accretive to the business case.<sup>3</sup> It is important to fully understand the cost and benefit implications and potential upfront investments of an apprenticeship program. This will likely be a critical discussion point with leadership to ensure the program is ultimately sustainable.

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<sup>3</sup> U.S. Department of Labor, "Apprenticeship Toolkit, Advancing Apprenticeship as a Workforce Strategy," <https://www.dol.gov/apprenticeship/toolkit/toolkitfaq.htm>

# 01

# JUMPSTARTING YOUR PROGRAM

## **Define Your Vision**

**Step 1: Develop Apprenticeship Priorities**

**Step 2: Confirm Executive Sponsorship**

**Step 3: Learn from Existing Models**

## **Identify Opportunities**

**Step 1: Determine Target Roles**

**Step 2: Determine Target Locations**



# Define Your Vision

Key steps, as shown in Figure 4, include:

Figure 4: Key Steps to Defining Your Vision



**DEVELOP APPRENTICESHIP  
PRIORITIES**



**CONFIRM EXECUTIVE  
SPONSORSHIP**



**LEARN FROM  
EXISTING MODELS**

## Step 1: Develop Apprenticeship Priorities

In starting an apprenticeship program, your company should first define the goals it is seeking to achieve. For example, the program may present an avenue to fill positions that have frequent or significant turnover or are hard to fill due to scarcity of talent or competition. Or, you may want the program to help with workforce development in your local community or foster deeper relationships with other companies in your area. Whatever your desired end state, establishing the goals of an apprentice program should be achieved by engaging leadership from across your company from the beginning. In defining priorities, you should also consider how the program's success will be measured. Examples of possible metrics to consider include:

- Number of apprentices
- Conversion rate to full-time employment
- Retention rate for converted apprentices
- Progression rates of converted apprentices

## Step 2: Confirm Executive Sponsorship

A successful apprenticeship program begins with executive support and sponsorship. As you define your vision, consider which key stakeholders need to provide their support to sponsor and advance the program. Identify who will be directly or indirectly impacted by the program, and who will be critical to ensuring its success. This may include leadership at the C-suite level, regional/office directors, HR and recruiting, local leaders involved in the community, and department or project leaders whose teams the apprentices will join. Successful apprenticeship programs must be driven through business ownership, partnership and support, and should not be an effort only handled by the HR department.

Involving stakeholders early in the process to define your apprenticeship program and vision will ensure alignment on goals and objectives, which should also be refined as needed. Identifying business owners and stakeholder representatives to own the design and execution of the program will also help drive its

success and progress. Finally, as the program is designed, ensure stakeholder concerns, challenges and priorities are understood and accounted for to guarantee success.

### Step 3: Learn from Existing Models

As you define your vision, learning about other established programs can offer valuable best practices, simplifying the implementation process and providing a guideline for your program. This playbook is a good example of the types of information you can attain to accelerate the implementation of your program. You should consider the following sources for input:

- **Other companies with established programs:** Look for other companies with apprenticeship programs to connect with, including those in other locations or industries: as many best practices cross industry and location borders.
- **Local community colleges:** In many cases these institutions have workforce development programs in place and may already have an infrastructure to support the set-up of an apprenticeship model.
- **Employer consortiums, business roundtables and Chambers of Commerce:** These types of entities are likely to have workforce development programs and/or support apprenticeships.
- **Local government:** Your local government may have established workforce development programs or offer incentives to build apprenticeships. In addition, the U.S. Department of Labor has defined a set of guidelines for apprenticeships that may be useful.
- **Internal programs at your company:** Looking internally can be useful—your company may have programs that could help shape your apprenticeship model, such as internships or Corporate Social Responsibility initiatives. These programs may offer existing models to follow when considering apprenticeships and offer a chance to expand upon something established, as opposed to starting something from scratch.

There are many companies and institutions that are on similar journeys which can offer input for consideration. For a starter list of contacts to consider, please see the “Key Contacts” and “Useful Links” sections of this playbook.

### Lessons Learned

- ✓ Engage senior executives across the company including from core business offerings, HR and community engagement teams to set the program’s goals.
- ✓ Involve stakeholders early in the process to ensure alignment on program goals, objectives and potential roadblocks, refining as necessary.
- ✓ Identify business owners/stakeholder representatives to help own design and execution of the program.
- ✓ Do not limit your research to companies in the same industry or location—many best practices cross industry boundaries.
- ✓ Establish relationships with external organizations to build a continual feedback loop and share learnings over time.

# Identify Opportunities

Key steps, as shown in Figure 5, include:

Figure 5: Key Steps in Identifying Opportunities



**DETERMINE TARGET ROLES**



**DETERMINE TARGET LOCATIONS**

## Step 1: Determine Target Roles

Apprenticeship roles should fill a real talent demand in your organization while having the flexibility to incorporate a longer training runway to proficiency. Scale is also important—choose roles that have the highest volume of positions, allowing the training investment and program management to be scaled to maximum efficiency.

As high retention and strong engagement are hallmarks of apprentice cohorts relative to traditional hires—look for roles with high turnover rates or positions that are difficult to fill—these are good fits for the apprentice program.

Re-examine requirements for entry level positions. Do these positions require a four-year degree, or is hiring from a college graduate pool simply a habit? Research conducted by Harvard Business School, Accenture and Grads of Life shows that employers are increasingly requiring a bachelor's degree for jobs that did not previously require one—while less than one third of the U.S. adult working population has a bachelor's degree.<sup>4</sup> Through this practice, called degree inflation, employers are not seeing an improvement in productivity, yet are cutting themselves off from a significant pool of talent and incurring hidden costs.

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<sup>4</sup> Joseph B. Fuller and Manjari Raman, "Dismissed by Degrees: How degree inflation is undermining U.S. competitiveness and hurting America's middle class," *Harvard Business School*, <https://www.hbs.edu/managing-the-future-of-work/Documents/dismissed-by-degrees.pdf>

Figure 6 provides a taxonomy of roles which should be considered for apprenticeships. This list is not exhaustive but represents a spectrum of potential focus points based on our experience.

Figure 6: Sample Apprenticeship Roles

<b>FUNCTION</b>	<b>POSSIBLE APPRENTICE TRACKS</b>
<b>IT</b>	Business Analysts, Developers, Testers, IT System Support, Conversion Analyst
<b>Human Resources (HR)</b>	Recruiting, Training & Learning Development, Employee Relations, Policy, Performance
<b>Finance</b>	Finance & Accounting, Invoice Processing, Payroll
<b>Marketing</b>	Sales, Communications, Advertising
<b>Office Management</b>	Executive Assistant, Office Manager, Mailroom, Location Facilitator
<b>Production</b>	Planning, Scheduling, Quality Management, Inventory Control
<b>Purchasing</b>	Procurement, Purchasing
<b>Research and Development</b>	Quality Assurance
<b>INDUSTRY</b>	<b>POSSIBLE APPRENTICE TRACKS</b>
<b>Cyber Security</b>	Analyst, Engineer, Architect, Administrator, Developer
<b>Insurance</b>	Claims, Underwriting Support & Services, Technical Underwriting & Finance Creation, Implementation of Integrated Capital Solutions
<b>Retail</b>	Customer Service Associate, Pharmacy Technician

## Step 2: Determine Target Locations

After identifying specific roles for apprenticeships, your company should consider where the roles will be located. Successful apprenticeships require formal learning, job shadowing, mentoring and on-the-job experiences. From an efficiency perspective, having multiple apprentices per role in one location helps maximize cost effectiveness in training delivery and shadow opportunities. It also provides the apprentices with opportunities to be around others in the program and helps establish a sense of community. As such, apprenticeships are most effective in locations that can support multiple apprentices and in departments that offer sufficient employee support.

It is also important to find local leaders in target locations that are passionate about talent development. Successful apprenticeships require strong local executive-level support to guide management and provide sponsorship, daily oversight and encouragement of the program.

### Location Checklist

Ideal apprenticeship locations should have:

- ✓ Sufficient volumes of the targeted apprentice roles to warrant level of investment and training structure and build sense of community;
- ✓ Adequate volumes of employees to support and provide shadowing and coaching opportunities to the apprentices; and
- ✓ Strong local leadership support and sponsorship.

### Lessons Learned

- ✓ Use the program to source talent against existing or planned demand for capacity to ensure program sustainability.
- ✓ Avoid creating incremental roles for apprentices beyond actual needs.
- ✓ Gather input from leadership and the business to determine target roles.
- ✓ Focus on roles with a viable multi-year career path.
- ✓ Locations should have scale for the targeted roles.
- ✓ Locations should have local sponsorship from senior leadership and project/department level, strong community engagement and enough staff to support high-touch shadowing and professional development.

# 02

## **DETERMINE AND EXECUTE PROGRAM MODEL**

### **Key Steps**

**Step 1: Outline the Program Structure**

**Step 2: Define Apprentice Experience**

**Step 3: Identify Sourcing Strategy**

**Step 4: Determine Candidate Selection Process**

**Step 5: Develop Training Structure**

**Step 6: Evaluate and Convert**

**Step 7: Execute the Program**

# Key Steps

Key steps, as shown in Figure 7, include:

Figure 7: Determine and Execute Program Model

- 1 OUTLINE THE PROGRAM STRUCTURE**  
Examine existing program model options and cost considerations.
- 2 DEFINE APPRENTICE EXPERIENCE**  
Consider salary, benefits, onboarding and reporting requirements.
- 3 IDENTIFY SOURCING STRATEGY**  
Determine targeted sourcing partners and outreach strategy.
- 4 DETERMINE CANDIDATE SELECTION PROCESS**  
Confirm interview logistics, timing and processes.
- 5 DEVELOP TRAINING STRUCTURE**  
Define training requirements and delivery method.
- 6 EVALUATE AND CONVERT**  
Establish performance management processes and define conversion process to permanent employee status.
- 7 EXECUTE THE PROGRAM**  
Implement the apprenticeship model including ongoing program management.

## Step 1: Outline the Program Structure

When defining an apprenticeship program model, there are several structural considerations:

- Will the apprentice be full-time at the employer or splitting time between the employer and an educational institution (co-op)?
- Will apprentices be employees or contractors during the program?
- Should your program be registered with the U.S. Department of Labor?

## Full-Time vs. Co-op

In co-op apprenticeship programs, companies often coordinate with educational institutions to combine external classroom education with practical work experience, while offering academic credit for the on-the-job work. An example of this would be a program in which the apprentice works Monday through Thursday and attends community college classes on Friday to earn their degree. Co-op models lend themselves to roles that require exposure to a wide variety of topics best facilitated through an established educational curriculum. In addition, the co-op model can be an effective way of attracting junior talent and creating a bond with them before they graduate and other companies begin to compete for them as employees.

Your company may reimburse the apprentice for tuition for classes they take during the program. At the completion of the program, the apprentice will have a degree from the community college and a job at the company, assuming they have met performance expectations. Due to the nature of this type of program, sourcing is generally limited to community colleges.

The full-time model provides formal learning and experiential on-the-job training, but does not require coordination with an educational institution or offer academic credit for the apprenticeship. This model is ideal for roles requiring depth of knowledge in a functional or technical area (such as a technology skillset) or specific industry process area which can be achieved in a more targeted/focused manner and without the need for a broad curriculum. The company running the apprenticeship typically will have any required content for formal learning in-house or have partnerships with organizations that can provide the training on demand. Typically, these models employ an upfront boot camp or immersion type of training and then move into the full-time work model with short duration targeted training implemented along the way as needed (e.g. professional development sessions every other week).

There is no limit to the sourcing options for the full-time model since achieving education from a community college is not required. This provides the opportunity to source through nonprofit programs and veteran channels, in addition to active community college students and graduates.



## Employment Model—Employee vs. Contractor

Apprentices may join the company as either contractors (employees of a staffing firm) or direct employees. It is preferable that apprentices join as employees. An employment model offers more control and flexibility over benefits and pay and allows more seamless integration of the apprentices into the company for more of a “community” feel. These benefits can lead to higher engagement and company loyalty,<sup>5</sup> as well as ease of access to company resources and more streamlined program-end conversions. Under an employment model, your company should also consider potential additional overhead costs such as health and welfare benefits, payroll and retirement expenses.

In some instances, an apprentice may join through a contractor model instead of an employment model. An example of this is when a nonprofit sourcing partner uses a contractor model in order to continue providing direct support (e.g. coaching or professional development) for its constituents. The contractor path may also be a more viable option for shorter term apprenticeships since it allows for greater flexibility to quickly add volume. As a trade-off, you would have less control over compensation, benefits offered and cost of the apprentice since contractors are generally paid directly by the sourcing partner or contracting agency. In addition, there are often fees or mark-ups associated with a contractor model that are paid directly to the contracting organization and need to be included in the economic considerations for the program. There may also be joint employment legal implications with a contractor model that need to be taken into consideration.

## U.S. Department of Labor Registration

Many apprenticeships in the U.S. are registered with U.S. Department of Labor. Registered programs have a nationally recognized credential and may qualify for government funding. U.S. Department of Labor apprenticeship models include time-based, competency-based, or a hybrid of the two.<sup>6</sup> Time-based apprenticeships are based on a set number of completed work hours, while competency-based programs measure skills through proficiency tests. A hybrid program combines a set number of hours of work with competency tests throughout the program.

Registration is not required to establish an apprentice program. In some instances, not being registered may offer additional flexibility for your program. The U.S. Department of Labor is very open to discussions regarding apprenticeship registration. Reach out to the U.S. Department of Labor Office of Apprenticeship to determine if registration is right for your organization.

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<sup>5</sup> John Scorza, “Benefits Can Boost Employee Loyalty,” *Society for Human Resources Management*, [https://www.shrm.org/resourcesandtools/hr-topics/benefits/pages/benefits\\_loyalty.aspx](https://www.shrm.org/resourcesandtools/hr-topics/benefits/pages/benefits_loyalty.aspx)

<sup>6</sup> U.S. Department of Labor, “A Quick-Start Toolkit, Building Registered Apprenticeship Programs,” [https://www.doleta.gov/oa/employers/apprenticeship\\_toolkit.pdf](https://www.doleta.gov/oa/employers/apprenticeship_toolkit.pdf)

## Step 2: Define Apprenticeship Experience

Once the program model has been laid out, there are several components of the apprenticeship experience that need to be defined.

### Job Descriptions

Job descriptions should include basic and preferred qualifications, along with details describing the key activities and other relevant information about the role. It is always helpful to include skills that will be developed and responsibilities that may come into play, so the candidates truly understand the extent of the experience. Ensure that job descriptions are relevant to the target talent pipeline. Employee relations or recruiting leadership should review and approve the job descriptions before they are shared externally. Company hiring policies and guidelines must be included in the job description as part of the basic qualifications.

### Program Duration

Identify the program duration that allows for a successful apprenticeship. Considerations in defining program duration include identifying the length of time needed for training and on-the-job training experience to confidently fill the role full-time at the end of the program. Program durations vary significantly based on role requirements, from short term to multi-year programs. Refer to Figure 1 (page 4) for a high-level view of appropriate timeframes by various role types. The recommended U.S. Department of Labor Registered Apprenticeship duration minimum is one year.<sup>7</sup>

### Compensation and Benefits

The compensation paid to an apprentice is typically lower than the compensation paid to someone who is already full-time in the role for which they are apprenticing. This is to account for the required additional investments such as training and coaching, as well as the learning nature and slower productivity ramp of the program. The degree of difference in the compensation is a company-level decision; leverage U.S. Department of Labor standards as applicable or necessary. At a minimum, however, the compensation should be set so that the individual is receiving a living wage and would not need under ordinary circumstances to supplement their earnings with additional work. The wage should take into account the type of program and benefits being offered. For example, in a co-op program in which the employer is reimbursing tuition, compensation may be lower than a co-op program where tuition is not being reimbursed. If the apprentice is a contractor, the compensation level may need to be determined in collaboration with the contracting organization.

We recommend using existing benefit programs applicable to the type of role, or applicable to similar programs like internships. This helps the apprentice feel a sense of belonging and decreases the likelihood

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<sup>7</sup> U.S. Department of Labor, "Frequently Asked Questions about Apprenticeship," <https://www.dol.gov/featured/apprenticeship/faqs>

that they will feel inferior to their colleagues. Also, note that varying benefits programs can present a significant effort and upfront cost. As with compensation, your benefits structure is a company-level decision. For the contractor model, benefits should already be included in the cost charged by the contracting organization.

## **Career Path**

Apprenticeships should be designed to lead to a lasting career opportunity. Ensure that all apprentice roles have the potential to lead to full-time employment and that there is a multi-year career opportunity beyond the initial program timeframe. This helps enhance the value proposition for the apprentices and supports a return on investment for the program.

## **New Joiner Experience**

Define orientation procedures for apprentices, considering how best to introduce company information, background and policies. Orientation may be specific to apprentices only or can be incorporated into orientation for all new joiners. Orientation may include “day-in-the-life” details, key processes and networking opportunities to help the apprentices better assimilate into the company. Consider sharing a welcome packet or “pre-read” materials to help answer general questions and concerns.

## **Support Network**

Another key piece of ensuring successful integration into the company is establishing a strong support network for the apprentices, which includes support in their roles, their home office and the broader company community. The network can include peer buddies (such as past apprentices) and executive mentors to provide first-hand knowledge and experience. In addition to internal company support, external organizations—often nonprofits—exist to provide ongoing resources such as coaching, mentoring, financial literacy education and other social services support as needed. It is also recommended that the program is structured with an apprenticeship cohort, to provide additional informal support across the apprentices themselves, with a minimum of two apprentices on each team or project for on-the-job training.

## **Measurement**

Finally, determine reporting requirements for apprentices, ensuring the ability to easily identify them within company systems in order to track their progress both during the program and over time. Metrics should capture key categories that demonstrate how effective the program is in achieving the program goals. Some examples of metrics to track include program completion, conversion offer and acceptance rates, retention and advancement over time. Tracking such metrics in conjunction with the role, type and amount of formal learning and other program elements can help measure the success of the program and identify opportunities for program improvement.

### Step 3: Identify Sourcing Strategy

Sourcing partnerships are key to building an effective apprenticeship program. Partners will help you with sourcing candidates, providing training, or in the case of the co-op model, both. There are several considerations when choosing a partner, as discussed in Figures 8 and 9.

Figure 8: Sourcing Partner Options

SOURCE	TARGET SKILLS & SUPPORT MODEL	CYCLICAL/ ON DEMAND TALENT	DEMOGRAPHICS OF TALENT
Community Colleges	Broad acumen via formal education with targeted industry or functional/ technical curriculum; possibility of helping to tailor the curriculum; degree-and- certificate-based	Cyclical—school year; On demand—alumni	Typically serve higher percentage of low-income individuals
Nonprofit Workforce Development	Focused functional/ technical training and professional, soft skills development; at times provide ongoing support	Varies by program	Focus on low-income individuals and others with barriers to employment
Boot Camps	Deep targeted technical training; often certification-based	Cyclical—typically multiple times per year	Typically, no explicit diversity focus; often highly educated career switchers
Open Education	Deep targeted technical functional/technical training	On demand	Typically, no explicit diversity focus; often highly educated career switchers

Figure 9: Sourcing Partner Selection Framework

CRITERIA	CONSIDERATIONS
<b>Program Alignment</b>	<p>Do you have an existing relationship to build on?</p> <p>Does the organization fit your corporate and apprenticeship mission?</p> <p>Does the organization have a contractor-only model? Does that fit with your program selection?</p>
<b>Candidate Readiness</b>	<p>Do the partners offer the breadth and depth of technical and professional learning and development needed for the apprenticeship role?</p> <p>How prepared are the candidates that come out of this potential partner's program?</p>
<b>Target Demographics</b>	<p>Does the source focus on serving the beneficiary demographic groups the program is targeting?</p>
<b>Scale and Availability</b>	<p>Does the source have enough talent for you to fill all your roles? If not, are you comfortable using multiple sources?</p> <p>Is there geographic alignment?</p> <p>Is the organization located in other cities you can scale to?</p> <p>Is talent available when you need it?</p>
<b>Cost Efficiency and Sourcing Support</b>	<p>Are candidates from this organization cost efficient for your model?</p> <p>Is there a sourcing fee or other related cost?</p> <p>What is their decisioning process for identifying and submitting candidates? Does it align with your expectations?</p>
<b>Training and Development</b>	<p>Does the partner offer training and development that is in line with your program needs (if you are using the partner for training instead of sourcing)?</p>

## Step 4: Determine Candidate Selection Process

Determine the interview process and requirements that are needed to ensure compliance with company standards. Leveraging existing recruiting and interviewing processes is recommended as current leaders are familiar and comfortable with current procedures. However, consider changes that may need to be applied as apprentices will likely be a different target audience and timelines will likely differ. Possible adjustments may include types of interviews (behavioral, case studies, skills based, etc.), number of interviews and requirements for past educational and work experience.

### Screening Candidates

Prior to interviews, candidate applications should be reviewed to identify which candidates should be interviewed for further consideration. Given many candidates will not have typical work or education experiences, it is important to focus on other means of assessing the individual. For example, consider competency-based screening assessments to expand your candidate pool, such as a game-based tool that uses artificial intelligence to assess behavioral traits and strengths. It is also important to look for ways to supplement typical screening and interview questions with opportunities to allow candidates to express non-work, civilian or military experiences.

Additional details on assessment options are shown in Figure 10.

Figure 10: Screen Assessment Options for Candidate Selection

ASSESSMENT TYPE	DESCRIPTION	PROS	CONS
Resumé Assessment	Paper or video resumé submissions	High-level view of the candidates’ backgrounds, skills and goals	No personal connection
Screening Calls	Phone or video call discussion	Ability to gauge intangibles, such as personality, engagement and level of excitement  Personal connection via voice or video interaction	Increased level of effort relative to other options
Competency-Based Assessments	A system to capture and measure a candidate’s knowledge, skills and attitudes	Standard comparison mechanism  May indicate aptitudes the candidate was not aware of or that do not come through via resumé	No personal connection  Additional costs associated with the various platforms

## Interview Structure

Identify the number of interviews and any time requirements between interviews to assess candidates, working closely with the local program teams. The interview structure could include virtual interviews, in-person interviews or both. See Figure 11 for interview options. Alternative assessment and selection tools such as video interviews, predictive placement assessments and proficiency tests can also be used to expand the number of candidates.

Similar to the screening process, make sure to establish the set of key traits or experiences you are looking for to fill the apprenticeships. Ensure that the interviewers are assessing candidates based on these criteria instead of looking for typical experience or educational alignments. For example, you may choose to assess the candidate based on criteria such as passion for learning, interest in the role, whether they are self-motivated, have structured thinking, can solve problems and have interpersonal skills.

It is also important to consider timing, ease and cost of different interview formats that may best align with each organization and team.

## Conducting Interviews

Leverage the local program team and business sponsors to identify potential interviewers. Educate interviewers on the differences in experience levels between apprentices and traditional candidates to ensure proper expectations are set in conducting interviews and evaluating candidates. Employees who may work closely with apprentices or are in the same line of business are ideal interviewers. Interview questions should be standard per apprentice role.

Figure 11: Interview Options for Candidate Selection

ASSESSMENT TYPE	DESCRIPTION	PROS	CONS
<b>Virtual Behavioral and/or Skills Interview</b>	Interview conducted via phone or video conference, typically used in the initial phases of assessment	Cost effective Easy to schedule	Do not physically meet the individual
<b>In-person Behavioral and/or Skills Interview</b>	Candidate meets with one person or a panel, answering a set list of questions	Meet in person to form connection	Time consuming Travel expense
<b>Technical Proficiency Test</b>	Shows how proficient the candidate is in a particular skillset (e.g. coding tests)	Up-front knowledge on how well the candidate knows a certain topic	Bias toward test-taking abilities vs. skill level, and other potential unintentional biases can lead to inaccurate results
<b>Mock Project</b>	Develop example project deliverable	Get to see the individual's direct work product	Apprentice's lack of experience may not lend itself to this method

## Step 5: Develop Training Structure

### Training Overview

The following training overview can apply to either a full-time or co-op model. To be most effective, apprenticeships should contain a mix of formal learning and on-the-job training. This will allow a balance of theoretical learning with practical application. On-the-job training involves mentorship and coaching during the working day by doing actual or mock work tasks and activities, with guidance and support for the apprentice. Formal learning involves virtual, in-person or computer-based training on specific topics such as a technology platform, academic area (e.g. statistics or finance) or a professional development topic. Formal learning can be provided by the company, a partner organization (such as an open source provider), a nonprofit or in connection with a community college as in the case of the co-op program. Work with your learning team and partners to decide which overall training approach and content will work best.

### Curriculum

Based on the nature of the role, determine the types of formal learning needed to enable the apprentices to be productive—often a combination of functional or technical training, professional development and company orientation. Professional development addresses topics such as work attire, time management, teamwork, collaboration and communication.

For each type of training, first determine the expected proficiency needed for the apprentice, then consider the timing of the need. For example, in the case of technical training, consider an upfront boot camp type of training to build an adequate level of understanding of programming a certain platform or language. In the case of professional development training, consider implementing a weekly, one-hour session so apprentices can continue to progress their skills as they gain new experiences and are exposed to new situations.

Identify if your company has an existing curriculum to reuse or tailor, if you will leverage a curriculum provided and/or delivered by your sourcing/education partner, or if there are vendors that could supply the training. Ideally, your program will either leverage an existing in-house curriculum or directly use that of a partner or community college. Creating new content will have associated costs and require additional administration to maintain. In the case of a co-op model, ensure that the apprentice has the correct course load which aligns directly with the intents of the program. Supplement with professional development and company-specific training as needed at the company site.



## Curriculum Delivery

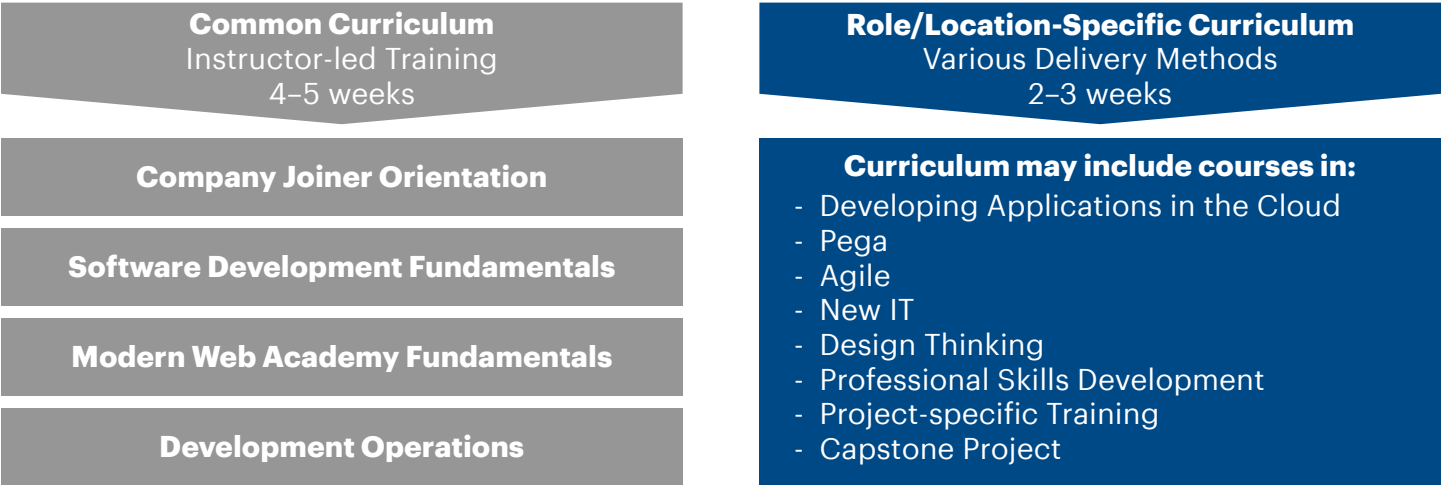
In terms of delivery, a mix of virtual, online and in-person learning is ideal to balance the benefits and drawbacks of each and provide the appropriate amount of training. The right mix will depend on the role and learning needs of your apprentices. Based on decisions defining the delivery mechanism, provider and specific curriculum, you will then be ready to develop detailed plans for implementation including training materials and schedules. See Figure 12 for additional details on training delivery mechanisms and Figure 13 for sample learning plans.

Figure 12: Curriculum Design—Delivery Mechanisms

ASSESSMENT TYPE	PROS	CONS
<b>In-person</b> <i>Instructor-led, in-person formal learning</i>	Allows for formal instruction and high-touch guidance and coaching through live exercises  Creates opportunities for in-person teamwork and simulations	More expensive and requires more logistics and coordination than online learning and on-the-job training  One speed for all learners
<b>Virtual Classroom</b> <i>Instructor-led, with participants joining via connected classrooms (e.g. telepresence or live video calls)</i>	Allows for formal instruction with guidance and coaching through live exercises  Provides ability to ask questions and hear from a live instructor without having to be physically in the room  Increases the potential candidate pool for instructors since they don't have to be in the same location as the apprentices	Requires logistical coordination and the infrastructure to support the virtual classroom  One speed for all learners
<b>Online</b> <i>Digital formal learning via online platform</i>	Allows apprentices to learn at their own pace  Accessible anytime, anywhere  Scalable and less expensive than in-person training	Coaching, guidance and team-based activities are online, losing the high-touch engagement
<b>On-the-job Training</b> <i>Project simulations and job shadowing</i>	Lends itself to deep immersion in the day-to-day activities of the job  Provides real-time learning opportunities from other more experienced team members	Requires capacity and teaching ability from supervisor and other team members

Figure 13: Sample Technology Apprentice and Insurance Learning Plans

Sample Technology Apprentice Learning Plan



Sample Insurance Learning Plan (Co-op)

COURSE TITLE	CREDITS	COURSE TITLE	CREDITS
Introduction to Business	3	Introduction to Finance	3
Business Mathematics	3	Computerized Accounting Systems	3
Financial Accounting	4	Introduction to Microcomputers	3
Managerial Accounting	4	Computer Applications	1
Intermediate Accounting	3	Intermediate Accounting	
Auditing	3		
Professional Development – 3 days		Company Joiner/Orientation – 2 days	

## Step 6: Evaluate and Convert

Successful apprentices require support and coaching throughout the program. Support networks—including project supervisors, counselors, executive mentors and buddies—should provide ongoing feedback to apprentices, as well as have direct input into the final evaluation process.

### Evaluation

Building from your company's standard performance and evaluation processes, consider what will be relevant to apply to apprentices based on the nature and duration of their role. Evaluation throughout the program will be critical to inform conversion decisions at the conclusion of the apprenticeship. The process should be consistent for all apprentices. Ideally, evaluations should occur at set intervals during the apprenticeship and include decision points on progress toward conversion to a permanent employee. Performance feedback should be documented and discussed with apprentices to ensure a sufficient level of guidance throughout the program. Confirm in advance your company's intent and timing for communicating and evaluating apprentice performance, and if there are opportunities for real-time feedback.

Informal real-time feedback from direct supervisors and other members of the support network will promote growth by providing input on what is working well and development points to improve upon. It will also allow the apprentice to course-correct frequently during the apprenticeship, should that be needed, and will lend itself to a successful experience. Consider if certifications or other competency progression evaluations will be part of the performance management process and, if so, ensure these expectations are clearly communicated to apprentices and their support network at the start of the apprenticeship.

In the case of apprentices with development points, allow for consideration of a new role or responsibilities to better utilize apprentice strengths. Identify the methods you will use to address any performance challenges or development points, up to and including criteria for dismissal, if necessary.

### Conversion to Full-Time Roles

Upon completion of the program, your company will determine if the apprentice's performance during the apprenticeship supports conversion to a permanent employee. You should outline how conversion decisions will be evaluated, documented and communicated, and who will be responsible for the final decision at the beginning of the program. Leaders or direct supervisors are frequently involved with or directly responsible for conversion decisions.

Determine the process to define compensation, benefits, position and level at point of conversion. Conversions typically include increases in compensation, level and/or benefits. You should also decide if any additional onboarding or orientation is required for converting apprentices to ensure a smooth transition.

Finally, if apprentices are not offered a conversion to permanent employment, consider if they might be eligible for future apprenticeships or other opportunities. Be open and honest with apprentices that are not offered permanent positions to help them understand the decision process, and provide support and encouragement in helping them find opportunities elsewhere.

### Hiring Decision Checklist

Consider the following factors in conversion decisions:



Collaboration, including team integration, teamwork and network building;



Contribution and accountability;



Progression of technical and professional skills; and



Completion of certification or competency evaluations (as applicable).

## Step 7: Execute the Program

As your apprentices start their apprenticeships with your company, ongoing program management will be essential to ensure smooth execution. As you track onboarding, training delivery and work performance, consider any contingencies you may need to plan for, such as training faculty cancellations, or apprentice schedule or other personal conflicts and compliance with various disability and leave laws. Ideally, the majority of activities related to running the apprentice program are done by your normal HR and business processes. However, particularly in the beginning, you will likely need additional oversight from the central implementation team.

Part of the program management effort should be to continually monitor for challenges or improvement areas, and correct in real-time as possible. Monitoring should include feedback from apprentices, supervisors or leadership. Ensure you are measuring and monitoring the program adequately to learn and evolve on a continual basis. Integration of measurement and evaluation into standard company processes will significantly reduce incremental effort required for the apprenticeship program. Figure 14 shows a sample apprenticeship timeline.

Figure 14: Example Execution Timeline

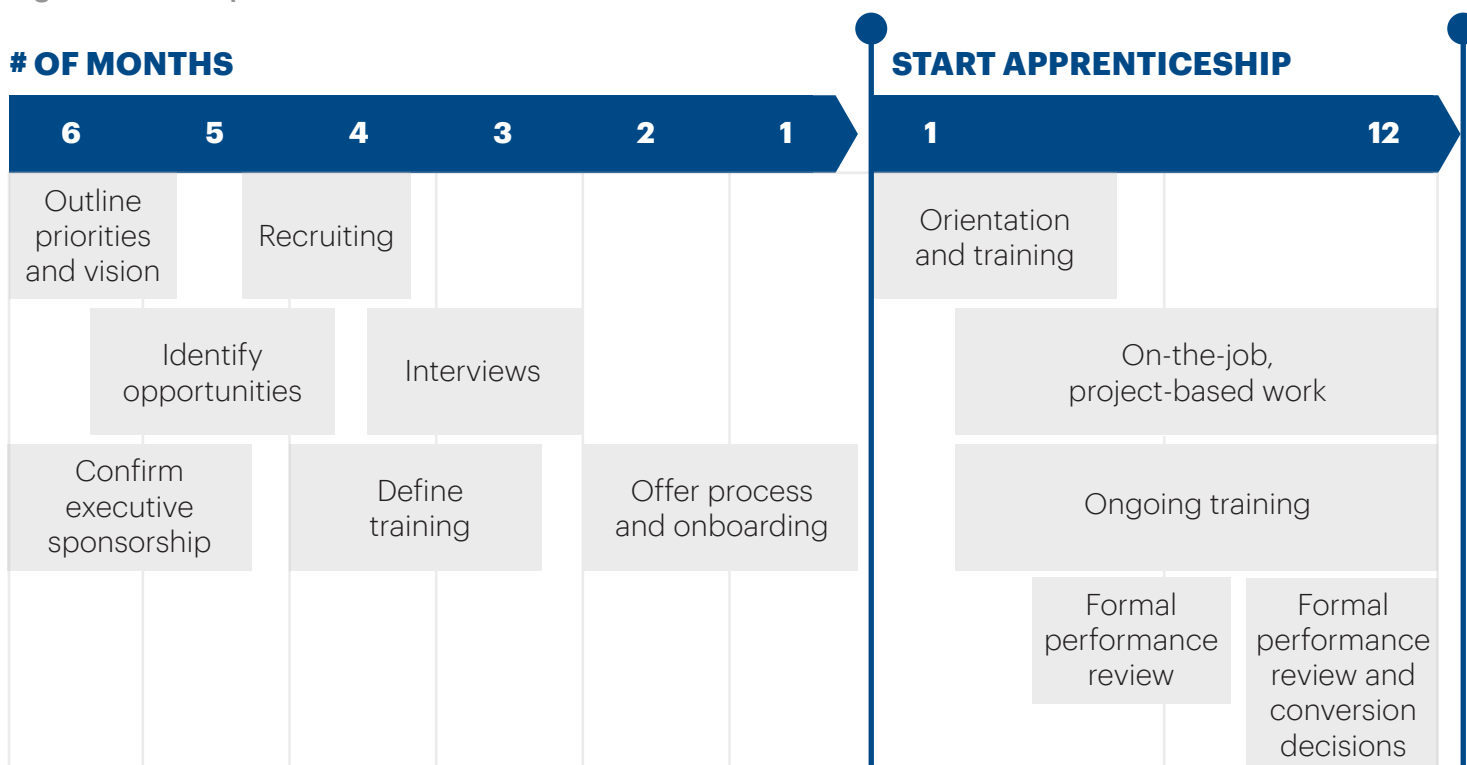


Figure 15: Lessons Learned for Determine and Execute Program Model

STEP	LESSONS LEARNED
<b>Apprentice Experience</b>	<p>Set job requirements to maximize the number of applicants.</p> <p>Create a strong support structure with mentors and/or buddies.</p>
<b>Sourcing</b>	<p>Work with partner(s) with strong alignment between company and partner values, and sufficient candidate volume to allow for fulfillment of roles.</p>
<b>Candidate Selection</b>	<p>Focus on behavior and potential in the selection process over credentials and pedigree.</p> <p>Leverage partner staff to actively promote the roles and support candidate identification.</p> <p>Engage project supervisors in interview process for alignment and buy-in.</p>
<b>Training</b>	<p>Leverage existing training and vendors where possible.</p> <p>Factor in technical, functional and professional skills training, in conjunction with on-the-job training, to provide opportunities to apply learning in the workplace.</p>
<b>Evaluation and Conversion</b>	<p>Set clear expectations with apprentices about what to expect of the program and future career path.</p> <p>Encourage frequent and ongoing open dialogue between apprentices and supervisors to determine goals, set up feedback mechanisms and encourage ongoing feedback to allow time for apprentice to course-correct if needed.</p> <p>Allow for consideration of a new role or responsibilities if better suited to the apprentice's strengths.</p> <p>Ensure a smooth transition for converted apprentices with fair levels of compensation and benefits relative to traditionally sourced employees.</p>
<b>Execute</b>	<p>Learn and iterate in real time—don't wait for the next cohort to implement changes.</p> <p>Obtain feedback from candidates at regular intervals.</p> <p>Set program metrics during the design phase and communicate progress to leadership and other stakeholders regularly.</p>

# 03

## **EVOLVE AND SCALE**

### **Key Steps**

**Step 1: Iterate on Program Model**

**Step 2: Identify New Locations or Business Areas and Additional Roles**

**Step 3: Refine and Expand Partnerships**

**Step 4: Join or Build a Network of Companies Committed  
to Apprenticeship and Workforce Development**

# Key Steps

Figure 16: Key Steps in Evolve and Scale

- 1 ITERATE ON PROGRAM MODEL**  
Build on the lessons learned and improve the apprenticeship model.
- 2 IDENTIFY NEW LOCATIONS OR BUSINESS AREAS AND ADDITIONAL ROLES**  
Discover new locations, business areas and roles apprentices could join.
- 3 REFINE AND EXPAND PARTNERSHIPS**  
Work on strengthening and expanding sourcing partnerships as the program grows.
- 4 JOIN OR BUILD A NETWORK OF COMPANIES COMMITTED TO APPRENTICESHIP AND WORKFORCE DEVELOPMENT**  
Partner with other companies and organizations to jointly commit to launching or expanding apprentice programs in local communities.

## Step 1: Iterate on Program Model

Now that your company has apprenticeships in progress, it is important to step back and look at the lessons learned from your experience. You should consider initial implementations of the program as pilots and expect there will be areas that can be improved and streamlined over time and with additional experience. Ask for feedback from participants and discuss what worked well and what did not. Outline improvements that could be made based on program evaluation or issues encountered during the program's progress.

You may find it helpful to fine tune the profile for candidates for your apprenticeships. Interview processes may be adjusted—consider alternative interview methods to best fit your needs. These may include virtual interviews or other methods of evaluation. As programs evolve and you gain more experience with apprenticeships, you may find ways to streamline your onboarding and support approaches to ensure the appropriate level of assistance required for the apprentices.

Consider if your identified training curriculum sufficiently prepared your apprentices for their work, or if content was too long, too short, too advanced or too basic. You should also evaluate the program management approach and review the cost and time commitments of various aspects of the program to determine efficiencies. Use your identified key program success metrics to help drive decision-making and analysis.

Finally, consider if the conversion process was objective and easy to manage for apprentices completing the program. Identify any opportunities to improve or streamline the process to enhance the experience for the apprentice.



## Step 2: Identify New Locations or Business Areas and Additional Roles

As you look to scale your apprenticeship program, consider the following:

- Expansion to new roles in new business groups;
- Expansion of existing apprentice roles to new locations; and
- Additional volume of existing apprentice roles in the current locations.

Apply what you have learned to determine where optimal new roles and locations might exist. If you are planning to expand to new roles, the easiest pathway is to target roles that have similarities to existing apprenticeships. For example, similar training needs or similar locations. This will allow you to utilize some of the existing infrastructure vs. having to create things completely anew.

In scaling your program, do not wait for the completion of one program to consider additional opportunities. You may promote the program to garner additional interest and excitement by sharing milestones about the program. Communication of apprenticeship successes, including retention and promotion progress for converted apprentices, will help raise awareness and excitement for the program. Tracking longer term success of apprenticeship program graduates, and sharing their progress, may also help build additional momentum for expansion.

## Step 3: Refine and Expand Partnerships

### Partnership Updates

With each apprenticeship iteration or expansion to new roles or locations, consider and re-evaluate the success of current partnerships and the potential need to add or change partners. Identify where partnerships can be improved or where things need to change to better fit your program. This may involve re-evaluating sourcing fee structures, suggesting improvements to curriculum, or altering candidate selection processes. Your partnerships will benefit from maintaining a continual feedback loop of what is working well or not working well to improve the process and relationship over time.

Alternatively, consider if there are new partners that might offer apprenticeship candidates. This should particularly be the case if you are considering expanding to new locations. If not engaged already, local governments and civic organizations can provide insight into current workforce development or education development programs planned or in progress, which may relate to your apprenticeship program. Local governments may also present funding or grant opportunities to help expand your apprenticeships.

Conversely, if you have had strong success with specific partners in sourcing your current apprenticeships, you should understand their ability to source any expansion or scaling plans. For example, many nonprofits have locations in multiple cities. If you have had a successful relationship with them in one city, you should seek to understand their footprint as it relates to your aspirations. Growing a relationship with a specific partner allows you to continually improve and streamline the process over time.

## **Curriculum Development**

One avenue to consider for deepening a partnership is collaborating to develop, shape or refine curricula to best enable future apprenticeships. Your company can seek to support the curriculum of educational providers such as high schools, community colleges, universities or boot camps to better prepare the students for employment and apprenticeship opportunities. Working to shape curricula will help develop skills that will be applicable to your workforce requirements, expand your sourcing network and create a more targeted candidate flow.

Partnering with other companies to jointly develop and shape a curriculum is a way to expand both your apprentice network and your sourcing channels. This can include co-investing or co-developing course material and concepts to support workforce development and apprentices, as well as volunteering guest speakers to bring industry practice into the classroom or providing mentors from employees to students.

## **Step 4: Join or Build a Network of Companies Committed to Apprenticeship and Workforce Development**

As you continue to build your program, consider joining or forming a network of interested companies, sourcing, training and government entities. Apprenticeship networks allow for shared best practices and the ability to create more momentum and interest around apprenticeships. A network should have shared apprenticeship goals such as committing to target volumes, committing to developing curriculum, sharing lessons learned or agreeing to rotate apprentices across participating members. The network should seek to continually expand its membership to further the collective mission of driving more apprentices.

Consider quarterly networking events with other companies and other institutions to continue expansion or connecting with a local Chamber of Commerce or business roundtable group to discuss the benefits and pathways to apprenticeships. Achieving the network's goals may be further facilitated by publicizing the network to gain momentum and support. Encouraging each member to bring in new organizations can also help build the network.

## Lessons Learned

- ✓ Treat initial implementation of the program as a “pilot,” understanding that there will be various areas that can be improved and streamlined over time.
- ✓ Track and measure program components to enable decision-making and analysis.
- ✓ Track longer term success of graduates of the program—e.g. retention, performance—to help build additional momentum for expansion.
- ✓ Consider how to scale during the program, rather than waiting for cohort completion.
- ✓ Share lessons learned and success stories broadly across your company to raise awareness and excitement for the program.
- ✓ Maintain a continual feedback loop with partners of what is working well, not working well to improve the process and relationship over time.
- ✓ Re-evaluate partnerships on a regular basis to enable the success of your program.
- ✓ Consider ways to deepen partnerships that are working well, potentially expanding into new regions together or new areas of apprenticeship.
- ✓ Encourage each member of the network to bring in new members.

## Additional Information:

### **Aon and Accenture Join Forces to Expand Apprenticeships Across Chicago**

<https://newsroom.accenture.com/news/aon-and-accenture-join-forces-to-expand-apprenticeships-across-chicago.htm>

### **Apprenticeships, long common in blue-collar industries, are coming to white-collar office work**

[https://www.washingtonpost.com/news/on-leadership/wp/2017/10/20/apprenticeships-long-common-in-blue-collar-industries-are-coming-to-white-collar-office-work/?utm\\_term=.d2f3935b5dc2&noredirect=on](https://www.washingtonpost.com/news/on-leadership/wp/2017/10/20/apprenticeships-long-common-in-blue-collar-industries-are-coming-to-white-collar-office-work/?utm_term=.d2f3935b5dc2&noredirect=on)

### **Apprenticeship programs enjoy new life as a workplace solution**

<https://www.chicagotribune.com/business/ct-biz-apprenticeship-expansion-1029-story.html>

### **Apprenticeship success in Chicago provides national model**

<https://www.washingtonexaminer.com/red-alert-politics/apprenticeship-success-in-chicago-provides-national-model>

### **Aon Apprenticeship Program—Meet Victor**

<https://www.youtube.com/watch?v=Dafll8lkRvU>

# 04

## **TAKING THE FIRST STEP**

**Useful Links**

**Glossary**

**Acknowledgements**

# Useful Links

For additional information on apprenticeships, additional reference materials and to find active potential partners in your area, please see the below links:

## **Apprenticeship System**

[State Apprenticeship Offices](#)

[Training Opportunities by State](#)

[Apprenticeship Community College Members](#)

[Apprenticeship Program Sponsors Database](#)

## **Business Partners**

[U.S. Chamber of Commerce](#)

[U.S. Women's Chamber of Commerce](#)

[Business Roundtable](#)

## **Educational Institutions**

[American Association of Community Colleges](#)

[Apprenticeship Community College Members](#)

[Community Colleges: Strategic Partners](#)

[Association for Career and Technical Education](#)

## **Federal Resources**

[U.S. Department of Labor Apprenticeships](#)

[Federal Resource Playbook for Apprenticeship](#)

## **Manufacturing Apprentice Playbook**

[Siemens - Employer Playbook for Building an Apprenticeship Program](#)

## **Workforce Intermediaries**

[Global Apprenticeship Network](#)

[Jobs for the Future](#)

## **Public Workforce System**

[Workforce System Contacts](#)

## **Relevant Documents**

[Dismissed by Degrees](#)

# Glossary

- **Apprenticeship:** “Earn-and-learn” programs that combine formal learning with on-the-job training experiences.
- **Cooperative Learning (Co-op):** Structured method of splitting time between an educational institution provider and an employer for structured experiential learning.
- **Formal Learning:** In-person, virtual or computer-based training.
- **On-the-job Training:** Hands-on training in the work environment.

# Acknowledgements

Thank you to our Chicago Apprentice Network partners:



05

**BRIDGING THE GAP  
BETWEEN TALENT  
AND OPPORTUNITY  
CHICAGO SUPPLEMENT**

# The Chicago Apprentice Network

Accenture and Aon co-founded the Chicago Apprentice Network (the Network) in August 2017 to serve as a way for apprentices to connect with one another and as a launch pad for other organizations to join the movement. The Network convenes companies from across Chicagoland who are committed to expanding professional advancement through apprenticeship programs. The Network facilitates sharing ideas, lessons learned and best practices among peers in business, education and civic organizations, including recruitment strategies, professional apprenticeship roles and curriculum and training enhancements geared toward apprenticeship advancement.

The Chicago Apprentice Network holds quarterly networking events for apprentices and employers that provide opportunities to network beyond their home employers, interaction with executives and leaders from across industries, and professional development through customized training and workshops. The Network also works to build a strong talent pipeline by increasing program awareness in high schools, building or partnering with educational institutions such as City Colleges of Chicago, and supporting nonprofit organizations dedicated to skill development, career enhancement and recruiting.

Current announced members include Accenture, Aon, McDonalds, Risk Management Solutions of America, Walgreens and Zurich. In less than one year, 14 companies have joined the Network, creating 275 apprenticeships in Chicago—that's more than 275 lives forever changed. The Network is working toward a goal of 1000 apprenticeships by 2020.

We believe that apprenticeship programs, particularly at the local level, are critical to igniting a spark of interest in technology fields and ultimately building a pipeline to help address the skills gap in the U.S. Apprenticeship programs are good for business and our communities.

The following program overviews provide company case study examples. We would like to share this information with you in hopes that it will allow you to better understand our local programs and where we may be able to best support your company in exploring an apprenticeship program. In this way, we look to further accelerate our common goals to close the skills gap in the U.S. and help those who are willing and able find employment in our ever-changing digital world.



# Leveraging Existing Programs

The following case studies from Accenture, Aon and Zurich focus on each company's process and learnings from defining the vision through program execution. The case studies focus on the apprentice roles summarized in the following table (Figure 17). Case studies are organized by company.

Figure 17: Apprentice Role Examples

ROLE	MINIMUM ROLE REQUIREMENTS	JOB DESCRIPTION
<b>Corporate IT</b> <b>Accenture</b>	High School Diploma with preferred IT-focused associate degree coursework	<b>Chicago:</b> Roles for business analysts, developers and testers determining functional requirements, as well as building and maintaining internal applications and platforms.
<b>Technology</b> <b>Accenture</b>	High School Diploma with preferred IT-focused associate degree coursework	<b>Chicago:</b> Roles that are client-facing in the technology business, such as developers, testers and conversion analysts.
<b>Insurance</b> <b>Aon</b>	High School Diploma or equivalent; Enrolled and fully accepted as a student at Harold Washington College or Harper College	<b>Chicago:</b> Roles that support the creation and implementation of integrated capital solutions for clients.
<b>Corporate IT</b> <b>Aon</b>	High School Diploma or equivalent; Enrolled and fully accepted as a student at Harold Washington College	<b>Chicago:</b> Roles that support Aon's technologies, IT systems and technical capabilities that are used by associates serving external clients.
<b>Human Resources</b> <b>Aon</b>	High School Diploma or equivalent; Enrolled and fully accepted as a student at Harold Washington College	<b>Chicago:</b> Roles that provide necessary support to solve critical HR and business challenges.
<b>Insurance</b> <b>Zurich</b>	High School Diploma or equivalent; acceptable college entrance exam scores	<b>Schaumburg:</b> Roles focusing on supporting Claims, Underwriting Support and Service, Technical Underwriting, Finance and Premium Audit related to Commercial Insurance.
<b>Cyber Security</b> <b>Zurich</b>	High School Diploma or equivalent; Enrolled and validated as fully accepted at Harper College 1+ year's work experience and/or voluntary community service	<b>Schaumburg:</b> Roles focusing on Threat Defense Operations, Instant Response, Application Security, Vulnerability Management and Threat Intelligence.
<b>Walgreens</b>	High School Diploma or equivalent	<b>Chicago:</b> Roles that support Walgreens retail stores, starting with Customer Service Associate, Beauty Advisor, Pharmacy Technician, and moving toward store leadership roles such as Shift Leads and Assistant Store Manager in training.

# Accenture Case Study

Accenture launched its Apprentice Program in 2016 to provide under-represented groups greater access to digital-economy jobs. The program enables individuals who have traditionally fallen outside our recruiting pipeline to develop skills in fast-growing fields such as information technology (IT) and cybersecurity, thereby gaining on-the-job experience—and the potential of full-time employment with Accenture.

The initial program was launched in Chicago, with a focus on corporate IT. With strong support from leadership at the national, regional and local levels, we have expanded the program to multiple locations and roles and now have more than 130 apprentices across eight cities. As we open innovation hubs in new cities, we expand our Apprentice Program to those cities, complementing our investment in innovation and job growth in local markets with an investment in providing opportunities to under-represented groups.

This case study discusses Accenture's vision for our National Apprenticeship Program and provides a detailed overview of how we developed our Chicago Apprentice Program—from design to execution.

## Define Vision

Our vision for apprenticeships initially focused on evolving our corporate citizenship initiative, Skills to Succeed, which provides under-represented talent with the skills they need to succeed in today's digital economy. Since 2011, Skills to Succeed has provided more than 2.2 million people globally—including more than 500,000 in the U.S.—with the skills to get a job or start a business. The program works with nonprofit partners that have strong track records of helping participants find employment, focusing on three key challenges:

1. The difficulties that under-represented communities face in participating in the innovation economy;
2. The skills gap facing most companies; and
3. The growing need to provide a means for professionals to either be upskilled or switch careers as technology continues to disrupt the talent needs and types of roles available.

We believe that apprenticeships are an important part of the solution to these challenges—and that these challenges are best addressed in local communities, with companies collaborating with other companies, local governments, educational institutions and nonprofits.

Our vision for Skills to Succeed continues to be providing under-represented talent with greater access to digital-economy jobs, but we are expanding this vision to augment our own efforts at onboarding talent. Our goal is to have apprenticeships be part of Accenture's talent strategy in every major market and to collaborate with other companies and organizations in these markets to help build a strong foundation of apprenticeships across the country.

We are at the beginning of our journey: We started in 2016 with the Chicago Apprenticeship Network, which we co-founded with Aon. That year we also became a lead partner of the City of Chicago's College to Careers initiative, which provides learning opportunities for Chicago-area residents, spanning seven community colleges and six satellite sites (City Colleges of Chicago). The program aligns each city college with a high-demand career sector and partners faculty and staff with leading employers and universities in the sector. Accenture is partnered with Wilbur Wright College, which houses the College to Careers' Center for Excellence for IT. In that role, we are actively enhancing and shaping the IT and cybersecurity curricula as well as employing apprentices from the program.

We intend to recreate the Chicago Apprenticeship Network model across the U.S. as we continue expanding our Apprentice Program. In the meantime, we are sharing our Chicago experience to help other companies establish their own programs more quickly.

## Identify Opportunities

### Step 1: Determine Target Roles

Our initial strategy was to identify where, within internal operations, we had a high volume of entry-level roles, coupled with the infrastructure to support on-the-job training and apprentice development. Our Corporate IT group in Chicago met both requirements, with roles focused on software engineering. From there we expanded to entry-level technology roles serving our clients. We evaluated where we had a high demand for roles in which talent could be developed through a combination of formal learning and on-the-job training. The process led us to a range of technology delivery entry-level roles across testing, development, conversion, design, business analysis, infrastructure support and project management office for a range of applications and platforms.

### Step 2: Determine Target Locations

In identifying target locations, Accenture prioritizes areas offering opportunities for apprentice roles at an appropriate scale. Chicago—home to a large, strategic Accenture office with high demand and entry-level growth needs—is an ideal target location. The robust team-oriented learning environment and strong leadership support are also critical success factors for the program.

# Determine and Execute Program Model

## Step 1: Outline Program Structure

### Full-Time vs. Co-op

Accenture uses a full-time model, structuring apprenticeships to fill a real talent demand. The intent is to convert the apprentice immediately upon completion of his or her apprenticeship, performance pending, rather than having a gap in time with Accenture while he or she returns to school to complete coursework. Accenture also works with multiple sources, not just educational institutions, to identify candidates for apprenticeships.

### Employment Model—Contractor vs. Employee

In Chicago, our Apprentice Program follows a full-time, time-bound employee model, consistent with other Accenture apprenticeship efforts. Over the year-long program, apprentices are Accenture “fixed duration” employees, receiving a competitive salary, a benefits package and paid time off.

### U.S. Department of Labor Registration

Based on the nature and extent of our current programs, we have decided not to register with the U.S. Department of Labor at this time. As we grow and evolve apprenticeships at Accenture, we will continue to explore whether or not registration is the right fit for us.

## Step 2: Define Apprentice Experience

### Job Descriptions

Accenture defined the appropriate job descriptions for the internal and client-facing apprenticeship roles, including basic and preferred qualifications, seeking highly motivated individuals with a demonstrated interest in the apprenticeship function, as well as an eagerness to contribute in a team-oriented environment. Focusing on potential over pedigree, we seek critical thinkers, team players, self-motivators and adaptable candidates—ensuring that the job description and basic qualifications are broad enough to attract multiple sources of candidates. A high school degree or equivalent is required, and a set number of credits toward an associate degree is preferred. In some cases, recruiting may need to share the opportunity to groups outside of the initial sourcing partner(s) for additional volume.

## **Program Duration, Benefits and Rewards & Career Path**

Our Chicago Apprentice Program is a 12-month program during which apprentices receive a combination of training and on-the-job learning while receiving a competitive living wage. All apprentices have access to benefits, including healthcare coverage and paid time off, and to Accenture's entire portfolio of learning materials.

Accenture's apprenticeships are tied to clear expectations of performance. Pending successful completion of the program, apprentices have the opportunity to become "permanent" Accenture employees, with a career path in their apprenticed area of focus. We encourage apprentices who do not become permanent Accenture employees following their apprenticeship to continue to pursue either a four-year degree in IT or other technology employment opportunities.

## **New Joiner Experience and Support Network**

During their first days at Accenture, apprentices attend new-joiner orientation along with other new hires. In addition to the typical orientation topics covered for all employees, apprentices also receive an overview of the apprenticeship program and an apprentice welcome packet, providing additional resources and support.

Consistent with support provided for every employee, each apprentice is assigned a career counselor to provide ongoing coaching and to coordinate feedback across apprentice supervisors and project teams to inform performance management. Each apprentice also has a formal mentor and a buddy to provide additional coaching and mentoring. Apprentices are encouraged to attend company community events and build their own network of contacts, including current and prior apprentices, and some also receive ongoing social services support and guidance from a nonprofit partner.

## **Measurement**

To track apprentices, we established a specific category in our HR systems that allows for reporting and oversight on key apprenticeship metrics. Over time, as sufficient data is available, we will look to program success indicators, including apprentice retention throughout the program, during conversion, and after conversion, as well as advancement rates of apprentices compared with those of their peers.

### **Step 3: Identify Sourcing Strategy**

The Accenture Apprenticeship Program is focused on providing workforce development opportunities mainly to candidates of diverse backgrounds (i.e., diverse by gender, ethnicity, persons with disabilities, veterans, etc.) without a four-year college degree. However, some apprentices already have college degrees but are looking to make a major career change (e.g., from education into technology). Accenture started with a strong set of potential partners for the Apprenticeship Program, leveraging our relationships with nonprofit organizations dedicated to preparing individuals for the workforce through our corporate citizenship initiatives, as well as our established connections with community colleges and military veteran sourcing pipelines.

Accenture's primary source for apprentices in Chicago is Wilbur Wright College. In addition, we source from other schools within City Colleges as well as from i.c.stars and Genesys Works alumni—two nonprofit workforce-development organizations with which we have existing relationships through our corporate citizenship efforts. Of the 27 people in our 2018 class of apprentices, we sourced 17 from Wilbur Wright College, five from i.c.stars, three from other City Colleges and two from Genesys Works.

Accenture seeks candidates with IT-focused coursework, critical-thinking, analytical and problem-solving skills, communication and interpersonal skills, curiosity and a desire for continuous learning. Our focus is on candidates with strong interest and passion for the role and who possess a foundation of technical and professional skills that will enable them to succeed within the apprenticeship program. Candidates from City Colleges typically are within 15 credits of a computer information systems degree with a 3.0 or higher cumulative GPA.

Accenture works closely with each sourcing partner to explain the program and the candidate qualifications, and sourcing partners typically help publicize the opportunity. In Chicago, we hold information sessions at Wright College and work with leaders from i.c.stars and Genesys Works to educate prospective applicants and administrators about the program. Wright College helps build awareness of Accenture apprenticeship opportunities through its career center, newsletters, social media, professors and faculty members and also performs an initial screening of candidates. Additionally, we work with One Million Degrees—a nonprofit that supports low-income Chicago-area students—in the community college selection process and in some cases supporting professional skills development. Through our partnership with City Colleges, One Million Degrees promotes the Accenture Apprenticeship Program to the students with whom it works.

## **Step 4: Determine Candidate Selection Process**

### **Screening Candidates, Interview Structure and Conducting Interviews**

Accenture's apprentice selection process leverages our core recruiting approach, but with an increased emphasis on each candidate's potential, attitude and aptitude rather than his or her credentials and pedigree.

The process typically starts with resumé and phone screenings, followed by in-person interviews in an Accenture office, which include an office tour and interviews with the managers who will work with the apprentices. Involvement of the managers in the interview process ensures their input and support in the hiring process and provides them with early exposure to potential candidates for their teams. Accenture conducts interviews consistent in number, duration and structure for all candidates, using standard processes and pre-set questions applicable to the position.

## **Step 5: Develop Training Structure**

We leverage a combination of up-front formal learning through online and in-person training, followed by on-the-job training. Formal learning is complemented by ongoing professional development through online and in-person training, as well as coaching from the apprentice support network.

### **Curriculum Requirements and Timing**

Accenture leverages internal and external training offerings—including company onboarding orientation, professional-development training and specific technical training—to deliver learning opportunities throughout the apprenticeship. All apprentices receive our company orientation at the start of their apprenticeship. For client-facing IT roles, we use existing technology training courses for the four-week formal learning curriculum. The first two weeks of learning are conducted via video technology to teach software fundamentals, development operations and modern web fundamentals courses. Weeks three and four of learning include in-person courses on application analysis, Agile and Accenture methodologies. On-the-job training begins after the four-week session and, similar to the internally focused roles, is based on coaching and mentoring.

Apprentices in our internally focused IT roles begin on-the-job training from the start of the program, with formal learning woven throughout the year-long program based on project-specific needs and individual apprentice development areas.

Professional skills training is conducted on an ongoing basis, consistent with Accenture's broader Apprentice Program. We leverage our Skills to Succeed Learning Exchange—a resource designed for educational and nonprofit organizations—which contains online and in-person learning content focused on foundational skills, career planning and job search, professional skills and job tracks.

## **Step 6: Evaluate and Convert**

### **Evaluation**

Accenture apprentices receive continual informal feedback and quarterly formal reviews to provide them with a clear understanding of their performance and on how they are tracking toward conversion. We use existing performance management processes and tools wherever possible, with some customization to adjust for uniqueness of the program.

Informal feedback is consistent with our existing performance achievement process, focused on real-time, frequent, forward-looking coaching discussions. As with all employees, apprentices coordinate with supervisors to set individualized goals and to receive project assignments and responsibilities. Feedback—including documentation and discussions on strengths, development areas and next steps—is provided on an ongoing basis. Accenture encourages immediate identification of and discussion on performance challenges to allow time for apprentices to course-correct if needed. In addition, we work with apprentices to identify new roles, positions or responsibilities to best leverage their strengths.

Apprentices also receive formal feedback at least quarterly to ensure they are getting the developmental input needed to convert at the end of the program. This formal feedback is captured and used to inform conversion decisions at the end of the program.

### **Conversion**

Accenture career counselors, project supervisors, executive mentors and program executive sponsors collaborate on conversion decisions. Accenture is direct with apprentices who are not offered permanent positions, helping them understand the decision process and providing support and encouragement to help them find opportunities elsewhere. Upon conversion to a full-time employee, apprentices receive an increase in compensation and applicable benefits consistent with their new “permanent” full-time role.

Conversion rates to date in the internally focused IT track of our Apprentice Program in Chicago have been high. Although still in its first year, the client-facing IT track has been very successful so far, and we expect similarly high conversion rates.



## **Step 7: Execute the Program**

To ensure that the Apprenticeship Program is successful, the program team monitors the program's progress and success and identifies opportunities for real-time improvements through regular meetings with local teams and apprentices. Meetings with local, regional and national leadership keep stakeholders informed at regular intervals. Finally, Accenture tracks the effectiveness of the program and apprentice performance through established metrics. The local and national teams continuously identify areas for learning and growth for continued program improvement.

## **Evolve and Scale**

Accenture has expanded its apprentice class size each year within the same role and location. Since 2016, Accenture's Chicago program has grown from five to 27 apprentices, and we've committed to a minimum of 25 apprentices in Chicago each year moving forward. We have also learned and built on our experience in Chicago to help lead the Chicago Apprenticeship Network, with a goal to share lessons with other companies in the city and to expand the commitment to apprentices. And, just as important, we've scaled the program by bringing it to new cities and different parts of our business.



**Danica** moved to the U.S. from Serbia in 2011. Though she had graduated from the Academy of Criminalistic and Police Studies in Serbia, she was seeking a new career path and saw few opportunities in her home country.

When Danica arrived in the U.S., she enrolled in Wright College to pursue an Associate in Computer Information Systems Degree and worked in a restaurant to afford her tuition. She chose to study technology because, “it provides the opportunity to transform any other industry.”

Upon graduation, Danica took a back-office job at a retail company, hoping to get her foot in the door and then find a way into their IT department. She worked with their legal and supplier management teams and, while she excelled and took on increasing responsibility, she realized that it would take a long time to transfer to IT.

Then she received an email from Wright College with IT job postings, including Accenture’s Apprentice Program. She applied, was accepted, and began working on Accenture’s Corporate IT team. Her retail experience was directly applicable; Danica helped to manage purchases from third party IT suppliers. Reflecting on her apprenticeship, Danica said, “I was given real work, real responsibilities and my team immediately made me feel welcome, empowered and supported.”

Danica joined Accenture as a full-time employee in June 2017 and was promoted to Senior Analyst in June 2018.



**Rolando** served in the U.S. Navy during the first Gulf War. He struggled with an undiagnosed disability, homelessness and unemployment following his service. With the help of the Department of Veterans Affairs, Rolando underwent rehabilitation and decided to try to turn his interest in computers into a career. He earned several certifications and took courses at a community college. In 2014, he began volunteering and eventually became an intern at the Jesse Brown VA Medical Center. There, he made it his personal mission to fix a computer lab that was in disrepair. As a result of his efforts, the old and broken computers were replaced with newly-donated ones, and Rolando worked to set up the lab so that other veterans had the resources to seek employment and training.

Convinced that he would enjoy a job in IT, Rolando decided that he needed to complete his degree to gain employment. He enrolled in Wright College and earned an Associate in Applied Science, Networking Systems and Technologies Degree. During his final semester, one of Rolando’s professors told him about Accenture’s Apprentice Program and encouraged him to apply.

Rolando is currently an apprentice within Accenture’s Technology practice and his role is application support. His daily duties consist of providing technical support for application users, assisting the project’s off-shore team with data migration duties, daily monitoring, maintenance and configuration of Windows servers, and monitoring/maintenance of a Veritas server cluster system. Rolando loves that his job allows him to interact with and help people every day.

# Aon Case Study

For over a decade, Aon has run a successful apprenticeship program in the United Kingdom that has allowed hundreds of young people to pursue a career path as they advance academically. In the U.S. however, white-collar apprenticeships are not widely recognized. In this rapidly changing economy, Aon recognizes that too many young people are being left behind because they lack the skills employers traditionally require for entry-level positions.

In an effort to address this growing skills gap and to establish a reliable talent pipeline, in 2016, Aon implemented an apprenticeship program at our Chicago headquarters.

The following case study provides an overview of Aon's vision for the apprenticeship model, the development process and the structure of Aon's current program. A discussion of the success and growth this model has experienced to date is included as well.

## Define Vision

Aon's mission is to provide unparalleled solutions around risk, retirement and health. In a shifting global landscape, this requires an innovative approach to talent development and acquisition. Even the best business model cannot reach its full potential if it does not innovate, especially when the pace of change and the complexity of risk is increasing. For Aon, apprenticeships are an innovative business solution that allows us to embrace change, reduce attrition and invest in the ongoing education and training of a new pipeline of highly-skilled and diverse employees.

We are challenging the traditional approach to workforce development and we believe apprenticeships are the wave of the future because they align incentives for:

- **The apprentice** – who receives real-life work experience and a pathway to a lifelong career while continuing their education and receiving a salary and benefits.
- **The employer** – who builds a diverse and innovative talent pipeline of skilled workers that was previously untapped.
- **The community** – which fundamentally shifts as students are provided alternative entry ways into corporate careers that were previously inaccessible. Apprenticeships provide an alternative route for students who do not pursue a four-year degree program and have the potential to reshape Chicago's workforce landscape.

# Identify Opportunities

## Step 1: Determine Target Roles

For Aon, apprenticeships are a solution and an asset for many of our business practices. Apprentices work in areas that support Aon's core business needs and include critical roles in Human Resources, Client Support and Technology. These are roles in which Aon has traditionally experienced a high level of turnover as individuals with four-year degrees quickly moved on to new roles.

This model has allowed Aon to better align talent and business needs for long-term success. By partnering with City Colleges and Harper College to develop a curriculum that aligns with Aon's business needs, apprentices are learning relevant skills in the classroom that they can immediately apply in the workplace. It's a win for them and win for us as we embrace a future that will likely require an increased level of on-the-job training.

# Determine and Execute Program Model

## Step 1: Outline Program Structure

### Employment Model

Apprentices work out of the Aon Center in Chicago's Loop or Aon's Lincolnshire office and attend classes at either Harold Washington College or Harper College. Currently, all apprentices work 28 hours a week and attend school for 12 hours a week. Upon acceptance into the program, each apprentice is assigned a mentor and placed on a team with colleagues they will collaborate with on a daily basis. Each apprentice is considered a full-time employee, receives full-benefits and has their tuition paid for as they work towards an associate degree.

### U.S. Department of Labor Registration

Apprenticeships are successful because of comprehensive partnerships, and Aon has looked to local and national agencies to ensure our apprenticeship offers every advantage possible to apprentices. We first turned to local government to ensure our program became an extension of the Colleges to Careers program started by Chicago Mayor Rahm Emanuel. This program helps local community college students earn industry-recognized credentials and degrees. We then pursued accreditation on a national level, and in 2017, successfully registered the apprenticeship program with the U.S. Department of Labor.

## Step 2: Define Apprentice Experience

### Job Descriptions

Apprentices are filling roles at the core of Aon's business offering skilled support to both internal and external stakeholders. These roles include:

**1. Insurance apprenticeship** – Insurance apprentices play an increasingly influential role by supporting teams that create and implement integrated capital solutions and services for the company's clients.

#### **Responsibilities:**

- Support the delivery of client-facing transactional service activities.
- Contribute proactively to client satisfaction, retention and profitability.
- Carry out administrative tasks contributing to serving client and business operation needs.
- Input data accurately to maintain management information.
- Partner with other Aon colleagues on collaborative projects.
- Follow set procedures to ensure adherence to the company's risk and compliance policies.
- Identify and implement improvements in the work environment.
- Use various computer-based systems to conduct work internally and externally daily.

**2. Technology apprenticeship** – IT apprentices provide effective support of the company's internal technology, which is critical to ensuring productivity of associates as they work to serve external clients.

#### **Responsibilities:**

- Set up laptops for new hires.
- Perform basic PC and peripheral repairs.
- Assist with incident ticketing processes: respond to assigned tickets (routine and urgent) within the timeframe specified by the current incident system service level agreement and work issues through to resolution.
- Maintain appropriate documentation within the incident system as determined through periodic ticket quality reviews.
- Troubleshoot basic printer and network connectivity issues.
- Perform basic software installation processes.
- Responsible for training room setup and support for audio/videoconferencing needs.
- Assist with project management coordination as needed.
- Learn and utilize new services and products or changes to existing services.

**3. Human Resources apprenticeship** – Human Resources apprentices partner closely with Aon's HR teams to provide necessary support to solve critical HR and business challenges.

**Responsibilities:**

- Attend and contribute to regularly scheduled meetings and team building activities. In many cases, this includes preparing materials for these meetings.
- Carry out administrative tasks contributing to serving business operation needs.
- Input data accurately to maintain management information.
- Partner with other Aon colleagues within HR and the business.
- Follow set procedures to ensure adherence to the company's risk and compliance policies.
- Identify and implement improvements in the work environment.
- Use various computer-based systems to conduct work internally.

**Program Duration, Benefits and Rewards & Career Path**

Each apprentice receives a competitive salary and full benefits including health insurance, a retirement savings plan and comprehensive on-the-job training and tuition toward their associate degree. The program lasts for two years as they work towards a full-time job offer upon successful completion. Once an apprentice has received their associate degree and completed their on-the-job training, Aon identifies a full-time position that aligns with Aon's business needs and each apprentices' unique interests, skills and recent work experience. Aon also helps apprentices look to the future as they consider their long-term career objectives with the company and what advancement can look like as they take on a new role.

**New Joiner Experience & Support Network**

An apprenticeship begins with an introduction to Aon and an orientation that explains each incentive the program offers. Facilitators walk through the basics of daily responsibilities, employee benefits and internal support resources that are available to the apprentice as they settle into their roles. Aon HR experts support apprentices as they select health plans, sign up their family members for insurance and discuss retirement options and explain other benefits that apprentices can take advantage of.

Aon has organized a support network that is focused on the ongoing development and success of apprentices. Each apprentice has access to a Human Resources lead, a manager and a mentor that help them understand their responsibilities and resolve any challenges they encounter in the workplace.

Throughout the program, apprentices also receive mentorship and development opportunities and are exposed to members of senior leadership. Both at Aon, and with other corporate campuses, apprentices participate in ongoing networking events. Once a quarter, the cohorts meet with apprentices at other leading Chicago companies to expand their contacts and further develop their skillsets.

### Step 3: Identify Sourcing Strategy

For this model to succeed in Chicago, Aon first worked to identify key stakeholders at the local and national level who would support the apprenticeship model, serve as third-party validators and adopt the program over time. Partners have included local educational institutions, community organizations, eligible Chicagoland apprentices, and peers across the financial and professional services industries.

Harold Washington College for example, while visible from Aon's Chicago headquarters, is an institution Aon had never previously partnered with or recruited from. Now, Aon regularly recruits from the institution and has established a consistent pipeline of young professionals for this program.

As we developed the foundation of our Apprentice Program, we worked to develop a relationship with City Colleges of Chicago and Harper College that would provide worthwhile opportunities to current and future students. We eliminated our four-year degree requirement for certain positions which opened employment opportunities to a new pipeline of young people at these institutions. We then worked with institutional leadership and academics to organize a classroom and corporate infrastructure that would set students up for success in a business environment. This required the development of an insurance curriculum that Aon advised on and the creation of a support network within the workplace that equips students with the resources they need to thrive as both students and employees. This partnership has allowed Aon to successfully prepare our apprentices to support our business objectives from the onset of their apprenticeship.

Aon seeks to recruit high school graduates and young professionals from Chicago for positions that traditionally have gone to those with bachelor's degrees or higher levels of education.

Applications for the inaugural Aon apprenticeship cycle first opened in 2016, and we hired 25 apprentices to our first cohort in January 2017. In 2018, Aon hired an additional 25 apprentices and we will continue at this rate through 2020.

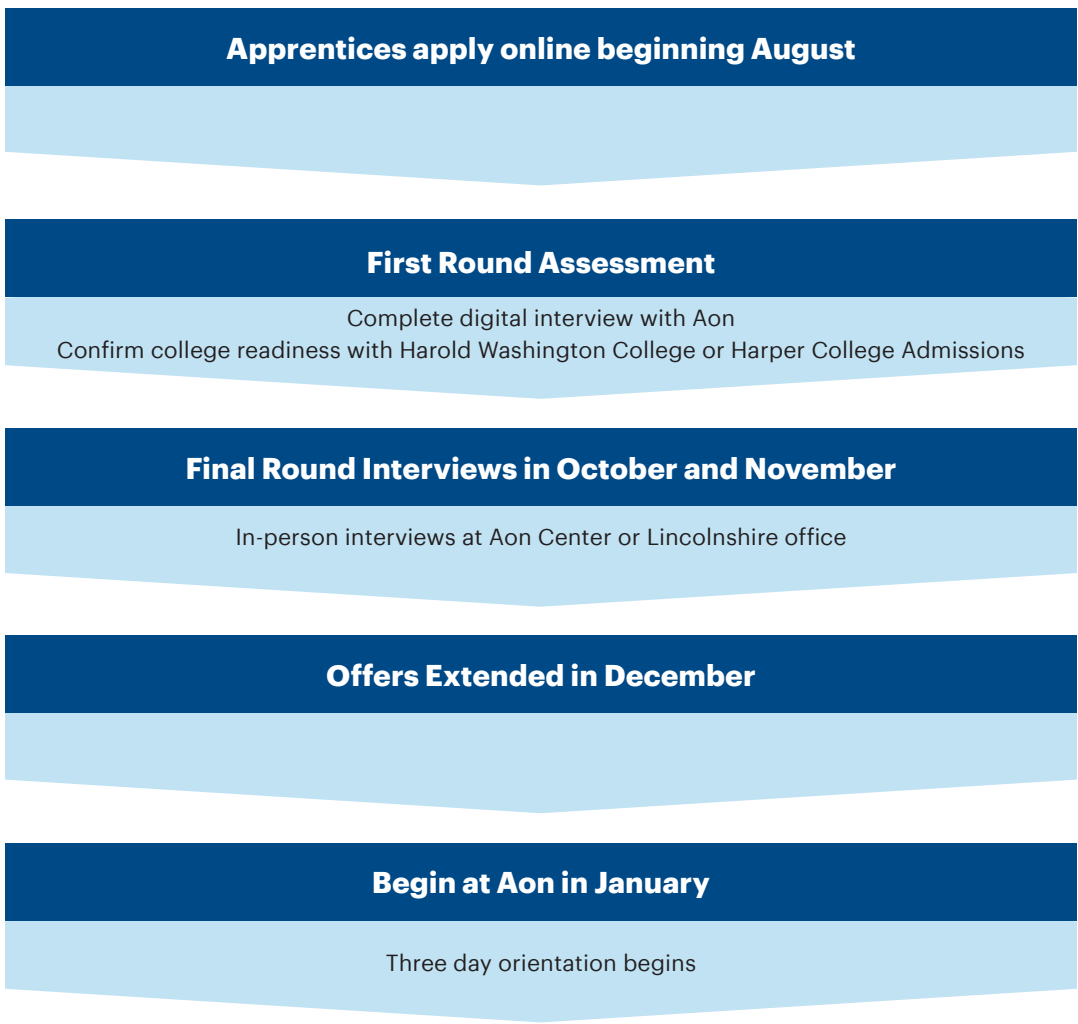
To support success in both the office and the classroom, Aon sought support from One Million Degrees, a nonprofit organization that provides comprehensive support to Chicago community college students to help them graduate. The organization supports Aon's apprentices as they navigate the transition between work and school and develop necessary skills around management and teamwork.

Step 4: Determine Candidate Selection Process

Aon’s inaugural apprenticeship cycle attracted 285 applications, and we asked 100 of these applicants to take a college readiness exam and to participate in a multi-round interview process.

Aon starts recruiting in August to identify new cohorts for the following calendar year. Recruitment takes place throughout the fall and offers are extended to selected applicants in December. This preparation ensures a new cohort is selected, enrolled in courses and prepared to begin their program in January of the following calendar year.

Figure 18: Aon Candidate Selection Process





## **Step 5: Develop Training Structure**

Working with educational institutions and instructors, we developed an industry-specific insurance curriculum that would prepare students for Aon's workforce and equip them with skills that would allow them to adapt on the job. We ultimately focused on creating a program that would offer students access to both a corporate and classroom environment, so their education would be immediately relevant and applicable in their positions. This partnership has allowed us to introduce apprentices to Aon's business objectives early in the process, which provides a foundation for each apprentice to build on as they look to full-time employment with the company.

## **Step 6: Evaluate and Convert**

### **Evaluation**

To ensure our apprenticeship program is successful, apprentice leads and managers monitor the engagement, progress and output of their apprentices. This is done through regular internal meetings and check-ins with the apprentices' colleagues and senior staff. Tracking the success of each apprentice allows Aon to not only support the individual's ongoing development, but to identify opportunities for improvement throughout the process so adjustments are made in real time.

### **Conversion**

Upon successful completion of the apprenticeship program, an apprentice receives a full-time job offer that aligns with Aon's needs and each apprentices' interests. Apprentices are making a tangible impact in their practice areas, and once they've achieved their associate degree, Aon places them in full-time positions that match their on-the-job experience, career objectives and recently developed skillsets.

## **Step 7: Execute the Program**

Aon evaluated business practices company-wide and eliminated the four-year-degree requirement that served as a barrier to several entry-level position that truthfully did not require one. These changes were implemented in areas that support Aon's core business areas and include critical roles in Human Resources, Client Support and Technology.

To ensure the success of apprentices and the teams they would be supporting in these new roles, Aon appointed resources to develop a support team that facilitates the two-year apprenticeship program. Resources include:

- **Human Resources lead** – The Human Resources lead evaluates each apprentice and matches them to a position that aligns with their skillsets, interests and background. This lead identifies where the roles may fit within the business and partners with staff to onboard apprentices.
- **Human Resources manager** – The Human Resources manager organizes and oversees the program curriculum including orientation and professional development sessions, recommends and implements program improvements and acts as the day to day contact for apprentices, managers and internal and external stakeholders.
- **Mentor** – Each apprentice on a biweekly basis meets with a mentor from One Million Degrees who offers advice on balancing work and academics and addresses concerns or challenges apprentices are facing.

These resources have supported apprentices and Aon employees alike as business practices throughout the company adopt apprentices onto their teams for the first time. The Apprentice Program has become an integrated asset to a variety of business groups as the program expands and apprentices are hired on to business teams full-time.

## Evolve and Scale

At Aon, we are proud to be leaders in the apprenticeship space and to serve as a successful model for what apprenticeship programs can offer. We have established a diverse and talented pipeline with our most recent cohort comprised of 20 ethnically diverse apprentices, half of whom are women.

In addition, Aon apprentices have become advocates for the expansion of this model and have represented the program in multiple meetings with the U.S. Department of Labor in Washington, D.C. Aon representatives have also testified before Congress on the economic value of apprenticeship programs and continue to attend and advise the U.S. Department of Labor's Apprenticeship Working Group.

Looking to the future, Aon is working with many industry leaders who understand the value of apprenticeships. Aon has helped others begin to formulate and adopt their own unique models that fit their business needs and has advocated for the expansion of this model across the region.

In September of 2017, Aon helped launch the Chicago Apprentice Network (The Network), to further these efforts. The Network is a cohort of companies that are committed to the expansion of professional advancement through apprenticeship program. The Network allows early apprenticeship adopters to learn from each other, while also sharing the apprenticeship model with other companies that are interested in creating their own programs. Further, the Network allows apprentices to interact with their peers and the city's top employers on a quarterly basis. Currently, the Network consists of six major employers, over 150 apprentices, and several more are in the pipeline.



**Victor** first applied for the Aon Apprenticeship Program at 19 when he was actively working two jobs while going to school full-time. He juggled classes at Harold Washington College while working at McDonald's and a Holiday Inn to support his wife and infant daughter. He worked nearly every day, leaving home at 4 a.m. and returning at midnight, regularly not sleeping at all to get his homework done for class.

Victor dreamed of a better life, and as a member of Aon's inaugural cohort, he has spent the last two years as an apprentice in the U.S. risk office at Aon's Chicago headquarters. Victor says the opportunity has completely changed his life by allowing him to establish a career path with a promising future and a balance for his family. Victor has now set his sights on one day becoming an actuary, and he plans to stay at Aon long-term.



**Stephanie** applied for the Aon apprenticeship at the age of 20. After transferring home to Harold Washington College from Taylor University in Indiana, Stephanie, a Brighton Park native, began working at the Starbucks in the Aon Center. She frequently ran into Ron Cielak, an Aon employee who thought she would be perfect for the company's new Apprenticeship Program.

With Ron's encouragement, Stephanie applied for the program's second cohort in January of 2018 and has continued her education at Harold Washington College. Stephanie has embraced her role as an apprentice and regularly supports her colleagues with bilingual client interactions as a native Spanish speaker. She is following in the footsteps of those who blazed the trail in her first cohort, and she has provided guidance to those looking to pursue their own apprenticeship path in the future cohorts.

# Zurich Case Study

Searching for ways to attract talent to the insurance industry pipeline, and inspired by the success of long-standing European apprenticeship programs in Switzerland, Zurich announced plans for a first-of-its-kind Apprentice Program for insurance professionals in the U.S. in early 2015.

A project team made up of individuals from various Human Resource disciplines, including talent acquisition, employee relations, learning and compensation, and employment law counsel, along with business unit leaders collaborated with Harper College to create a two-year program where participants have an opportunity to “learn while they earn.” The program allows participants to complete an Associate in Applied Science degree in Business while developing skills through on-the-job learning experiences as they rotate through various business units over the course of two years. The program launched in January 2016 with 24 individuals and a commitment to graduate 100 apprentices by 2020.

This case study provides an overview of Zurich’s Apprentice Program, from design decisions to lessons learned and a look to the future.

## Define Vision

Our vision for apprenticeships was to create a program that was not only viable for Zurich’s commercial insurance business but was also flexible, scalable and sharable. This would allow us to grow apprentices within our company, across our industry and within the regions that we work. Our success is not simply measured internally, but also includes the leverage we can gain by supporting the apprentice movement.

## Identify Opportunities

### Step 1: Determine Target Roles

We began our Apprentice Program by determining where we had consistent ongoing needs for entry-level talent. We sought roles that would not only allow apprentices to be contributors, but to also learn about key business units through on-the-job experiences. We launched our program with positions in Claims Administration and Operations and Underwriting Support. From there, our program has grown to include entry-level roles in Finance, Premium Auditing, and Technical Underwriting. All positions are rotational and give apprentices the opportunity to work across multiple business units during the two-year program.

## Step 2: Determine Target Locations

Zurich's Apprentice Program launched in our North America headquarters, located in Schaumburg, Illinois. This location offers the variety of hands-on opportunities necessary to gain a broad view of the insurance industry, along with the infrastructure and people resources required to support such a program. Future consideration of expansion to other Zurich locations would take these into account.

# Determine and Execute Program Model

## Step 1: Outline Program Structure

### Full-Time Employment

Zurich apprentices are considered full-time employees and are eligible to participate in the same benefits as other full-time employees. Apprentices attend courses leading to an Associate of Applied Science degree in Business on-site at Harper College two days per week and work on-site at Zurich in their rotational role the other three days. Apprentices are contributing team members in all business unit rotations that they complete, and remain in their final rotation role, or a comparable position, as a full-time employee upon completion of the program.

### U.S. Department of Labor Registration

Zurich's General Insurance Apprentice Program is registered with the U.S. Department of Labor. Upon completion of the program, participants are awarded an Associate in Applied Science degree along with a Certificate of Completion of Apprenticeship from the U.S. Department of Labor.

## Step 2: Define Apprentice Experience

The recruitment, placement and onboarding of apprentices as well as collaboration with Harper College are handled by Human Resources. Day-to-day management, on-the-job learning and mentoring of apprentices are handled by a network of business unit team managers and assigned mentors who provide oversight and support to participants as they complete the program.

## **Job Descriptions**

Zurich's talent acquisition team works to identify and screen individuals for the apprentice pipeline. A high school degree or equivalent is required, with preferred qualifications of some work or voluntary community service experience, along with some level of computer proficiency, customer service and communication skills and attention to detail. Candidates for the program must be enrolled at Harper College and meet their admission requirements.

## **Program Duration, Benefits and Rewards & Career Path**

Zurich's General Insurance Apprenticeship is a two-year program leading to an Associate of Applied Science degree in Business along with a Certificate of Completion of Apprenticeship from the U.S. Department of Labor. Harper College coursework also includes four insurance courses and examinations that may lead to an Associate in General Insurance designation.

Zurich apprentices are considered full-time employees and enjoy access to the same benefits as any other full-time employee of the company. Apprentices are compensated at a market competitive rate that will progress toward their first post-apprentice role. Course tuition, fees and books are paid directly to Harper College by the company on behalf of the apprentice.

Upon successful completion of the program, apprentices are placed in roles within their final rotation area, or a comparable position. After one year in this role, the former apprentices are eligible to post for other Zurich job opportunities for which they may be qualified.

## **New Joiner Experience & Support Network**

New Zurich apprentices participate in an onboarding program that is delivered by Learning and Development. Over the course of this multi-day orientation, participants are introduced to Zurich's purpose, values, and strategy as well as the structure of the organization. They learn about and have the opportunity to enroll in various benefits and meet the leadership teams from their respective business units. Additional onboarding topics include an overview of the program structure and a review of the program guide.

Following onboarding, apprentices participate in a mix of classroom and relevant on-the-job training for the rotation to which they have been assigned. Each apprentice is paired with a mentor within their team who is available to help with day-to-day technical questions as they perform and grow in their role. This experience will be repeated each time an apprentice moves on to a new rotational opportunity.

In addition to support within Zurich, apprentices meet regularly with a counselor or coach at Harper College. The coach is intended to be a source of support and guidance for apprentices as they navigate college-level coursework in addition to balancing work and life responsibilities.

## Measurement

Zurich apprentices participate in the same performance and development cycles as any other Zurich employee. They are assigned objectives that reflect their unique roles as students and contributing team members and meet with team managers regularly throughout the year for one-on-one discussions where they receive performance feedback and have the opportunity to discuss development. With just one graduating cohort under our belt, we lack sufficient data to make strong conclusions regarding performance, retention and other key performance indicators.

## Step 3: Identify Sourcing Strategy

Zurich apprentice opportunities are advertised on the company website and through the Office of Apprenticeships at Harper College. We are currently exploring other sourcing possibilities, such as career fairs, college information nights, veteran groups and collaborating with local nonprofit organizations.

Applicants to Zurich's Apprentice Program must first be admitted to Harper College, meeting their admission requirements. In addition to a high school diploma or equivalent, we seek candidates who possess interpersonal and communication skills, attention to detail, and customer service and problem-solving abilities. Participants should have an interest in pursuing a career in the insurance industry and some prior work or community service experience is preferred. Successful candidates display a high degree of initiative and personal accountability as well as the ability to adapt to changing circumstances.

Zurich recognizes the diversity of our workforce as an asset. Our practice of recruiting talent from a variety of backgrounds and perspectives applies to our Apprentices Program as it does for any role at Zurich. We consider candidates without a four-year college degree as well as individuals who may be re-entering the workforce or seeking to make a career change.

## Step 4: Determine Candidate Selection Process

### Screening Candidates, Interview Structure & Conducting Interviews

Zurich's apprentice selection approach begins with resumé and phone screenings conducted by our Talent Acquisition team in HR, followed by in-person interviews of those who successfully complete the phone screen at our Schaumburg headquarters. On-site interviews include an explanation of the program background, office tours and interviews with the managers who will work with the prospective apprentices. Zurich conducts interviews consistent in number, duration and structure for all prospective apprentices who successfully complete the phone screen, using standard processes and pre-set questions to identify competencies applicable to success in the role.



## **Step 5: Develop Training Structure**

Zurich's Apprentice Program is certified as a hybrid program, combining on-the-job learning hours with completion of requirements for an Associate of Applied Science degree through Harper College.

### **Curriculum Requirements**

Zurich's on-the-job learning curriculum was developed in-house by our Learning and Development team in collaboration with subject matter experts in the business areas that support apprenticeship. In addition to the job-specific training and experience gained through core rotational opportunities, Zurich apprentices participate in sub-rotations throughout the two-year program which allow them to learn about other areas of the business, such as operations, marketing, risk engineering and communications. These sub-rotations range anywhere from one to four days and include formal instructor-led learning by subject matter experts, as well as application exercises.

Additional learning opportunities at Zurich include completion of annual required training modules and access to a library of self-paced, online learning courses covering soft skills, such as time management and communication, as well as technical training for programs, such as Microsoft Office Suite.

## **Step 6: Evaluate and Convert**

### **Evaluation**

Zurich apprentices participate in the same performance and development cycle that is applicable to all Zurich employees. Apprentices meet regularly with team managers in a one-on-one setting for informal feedback and coaching discussions. Formal quarterly feedback and development conversations are also encouraged. Year-end performance assessments are completed for each apprentice and documented in our performance management system. The year-end assessment is delivered through a formal conversation between the apprentice and their team manager.

### **Conversion**

Upon successful completion of the program, apprentices are converted to roles in their final rotation area, or a comparable position.



## **Step 7: Execute the Program**

Zurich's Apprentice Program is maintained and executed by leads within Human Resources. Leads initiate the recruiting and placement of cohort groups, conduct onboarding and monitor the progress of apprentices across the two-year length of the program. Leads also serve as liaisons to Harper College and the U.S. Department of Labor. Meetings with apprentices, managers and other stakeholders have been established to gather feedback and assist with the continuous improvement process for the program.

## **Evolve and Scale**

Zurich launched its Apprentice Program with 24 hires in 2016. Two cohort groups were onboarded in 2017 and a new cohort joined in 2018. To date, 62 apprentices have been hired into the General Insurance Apprenticeship Program.

In August 2018, we responded to a growing need for talent in the field of Cyber Security by launching a Cyber Security Support Technician Apprentice Program with four participants. Over the course of two years, these apprentices will complete on-the-job learning rotations in threat defense, incident response, application security, vulnerability management and threat intelligence while completing coursework and multiple third-party certification exams.

We continue to monitor and seek feedback from participants and other stakeholders to utilize in our continuous improvement process. We continue to be open to additional opportunities to expand the Apprentice Program at Zurich. We are also planning to replicate the program in other U.S. locations where the opportunities and infrastructure are in place to support such a program.



**Dane**, a military veteran, worked at an auto dealership for six years. Being married with a young family and working long hours, including weekends and holidays, was stressful. He found that his military experience was not able to replace having a degree in the job market, but going back to school seemed impossible. The “earn-and-learn” approach of apprenticeship and the Monday through Friday workweek provided the right balance.

Dane completed his apprenticeship and now works full-time as a member of Zurich’s Underwriting Services team.



**Noelia**, a working mother with a young son, became interested in the insurance industry while working as a medical biller for a large healthcare system. Without a college degree, she felt that her career opportunities were limited. Apprenticeship allowed her to join a well-established company where she would be able to learn and build a professional network while completing her studies.

Noelia completed her apprenticeship and works full-time in Underwriting Services, while continuing to pursue her bachelor’s degree.

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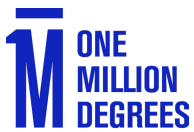
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