

Report on the National Survey of the New Zealand Scrap Metal Industry



The report was written for EXITO by Chris Beardsley and Philippa Cosgrove of Performance Matters Limited.

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1. Executive Summary

Industry Response

Sincere thanks to the Scrap Metal industry for your enthusiastic response to the survey– it has been much appreciated. An enormous amount of useful information has been identified which will impact very significantly on future planning for industry training.

Managers and supervisors have been very flexible about how to make time for their staff to be involved in the survey. We were keen to make sure we heard from as many people as possible - sometimes this meant a 6.30am start so that we could survey staff prior to them starting work at 7am. We did not experience any dissatisfaction from employees about coming to work half an hour early – on the contrary respondents were interested and curious as to why they were being surveyed and once this was explained were very willing to be involved.

Only one company declined to be involved – they were concerned that the survey would mean company details were not kept confidential. Despite our efforts to inform them of our confidentiality process they remained adamant that they would not be involved.

We did plan to have more managers respond. However the pressure of work meant that many managers were overloaded with other work and did not have time to complete the questionnaire – this was somewhat disappointing as more respondents in the manager category would have provided a greater level of information about the industry.

Thank you to everyone who participated. You have ensured we received data that has provided a clear picture about training requirements in the industry.

The results of the survey will be used in the next stage of development to ensure the future skill needs of the industry are improved by building upon its existing strengths. The recommendations you have made will ensure that the direction taken for training in the Scrap Metal industry meets the real needs and concerns of those working within it.

Purpose of Survey

During November and December of 2006 and March and April of 2007 the Extractive Industries Training Organisation National Scrap Metal Industry survey was conducted throughout New Zealand.

The Tertiary Education Commission had charged all Industry Training Organisations to take a leadership role in identifying and meeting future skill needs in the industries they represent. As a result the Extractive Industry Training Organisation (EXITO) decided to conduct a national survey of the Scrap Metal Industry to carry out research to enable planning of the future training needs of the industry.

It is envisaged at the completion of this project that EXITO will be able to improve its responsiveness to the needs of the scrap metal industry in terms of current and future skill needs.

Nine companies were surveyed in the regions of Auckland, Wellington, Christchurch, Dunedin and Invercargill.

Methodology

Once the initial interviews of industry experts were completed a draft questionnaire was designed and circulated to the EXITO personnel and industry experts for their comment. Amendments were made based on their feedback.

Next a pilot-test was conducted with a cross-section of operators who fitted the profile of the final group to be surveyed. Finally the questionnaire was amended to take account of all the pilot-test information and as a result two questionnaires were produced – one for operators and one for managers, professionals and technical staff. The 21 pre-test questionnaires that had been completed were assimilated into the survey results.

The surveys were conducted anonymously. Respondents were informed of the purpose of collecting the information (i.e. the questionnaire) and that the use and disclosure of the information would be limited to what is necessary to fulfill the survey purpose. We did not ask for people's names. Survey responses cannot be used to identify an individual because no personal information has been used that would enable identification of the survey respondent.

Survey Response Rate

The design and pilot-testing of the questionnaire made it easy for respondents to participate fully. The length of the questionnaire was suitably short so that it could be quickly completed. The response rate from the two questionnaires was outstanding in that a near 100% rate of questionnaire return was achieved.

The response rate of questions on the operator survey drops to around 60% once the questions focus on training. Presumably this is because of the number of operators not receiving training are unable to comment.

Notably one of the manager/professional questionnaires was returned with a lot of missing data.

Demographic Data - New Zealand Scrap Metal Industry

Due to a small sample size of respondents from managers/professionals/technicians (7 only) the demographics for this group have been collapsed with those of the operators. This group's demographics were similar in covering the spectrum for age, time spent in the industry etc. to make this a valid grouping.

Men make up 89.7% and women 10.3% of the scrap metal worker population.

The respondents consisted of 76.5% NZ European/Pakeha, 14.7% NZ Maori with very small percentages coming from other ethnic groups.

All seven of the managers/professional/technicians identified as NZ European/Pakeha. One of this group was female.

Gender

There are very few women operators working within this industry. However, on the few sites where women are employed as operators their managers speak very highly of their competence and efficiency.

Comments by managers/professionals showed little resistance to the idea of women operators. While attitudinal barriers to employing women appear to be minimal, most of the respondents expressed the view that the industry is intrinsically unappealing to women.

Encouraging more women to become operators could be one way to reduce recruitment difficulties in the future. There is also a range of reported benefits for any workforce that moves from a single gender population to a mixed gender population.

Ethnicity

The ethnic diversity represented in the scrap metal industry broadly reflects that of the general population. However, there is still rich scope for attracting more ethnic groups into the industry, in particular those migrant groups known for their hardworking and conscientious work ethic.

There were surprisingly low numbers of Pacific Islanders employed in the industry; more consideration into how this group could be attracted into the industry merits attention.

Given that 16% of the operator workforce is Maori, one might expect to see some Maori represented at manager level, especially given the increased educational achievements of Maori over the last 20 years.

Attraction to the Scrap Metal Industry/Pay Rates

Only a small number of operators cited remuneration as the motivating reason for working in the scrap metal industry. While it is 'just a job' to many operators, an equal number reported positive reasons for working in the industry, ranging from enjoying working outside to an interest in scrap metal. A sizable number also reported family/friend connections that had brought them to the industry.

Understanding the non-financial reasons that are attracting and retaining operators in the job may assist both in retaining workers and in promoting the industry to new recruits.

Most operators are working long hours for generally low wages. A number of managers/professionals suggest paying operators more to attract and retain skilled workers.

Future Career Aspirations

An astounding 90% of all respondents signaled their intention to remain working within the scrap metal industry. This is an excellent vote of confidence for the industry. It is of interest however, that the statistics indicate that just over 30% of operators have been employed for two years or less. While some of this may be new recruitment due to industry growth, it nonetheless suggests that companies can not afford to be complacent about staff retention.

Training

Operators understand safety is the number one reason for training, followed closely by improving skills. In an industry which works with heavy machinery with the potential for dangerous accidents this indicates that the importance of safety is understood. However, it is of grave concern that a number of operators report getting no training while others felt more safety and first aid training were required. As one operator commented, *“This industry is too lax re: safety. It scares me”*.

The connection between effective training and safety is well recognised; while this may be accepted in theory it is clear that some companies are far from adequately implementing this knowledge in practice.

Operators report a lot of interest in training and as is suggested by the high number of people who wish to remain in the industry there is a significant interest factor inherent in the work itself. The key expectation operators had for training was to increase their skill levels (followed by a safer workplace). A number of operators spoke with pride about their ability to identify different metals and work with heavy machinery. They see training as the best way to improve their skills and expertise and they want the opportunity to do more training. Some were even prepared to train unpaid in their own time. While many operators are receiving training there is another group who are not.

Encouragingly, managers/professionals report a raft of significant benefits that come from training, including increased productivity, safety and problem solving abilities. There is obviously no obstacle to the idea of employees receiving more training, yet two thirds of managers/professionals reported not enough training is being provided to operators.

The single biggest barrier to receiving training cited by respondents is finding time for it. Training must be accommodated into the already pressured demands of the work day. Balancing training against operational needs is a key issue for the scrap metal industry to grapple with and further strategies need to be found to help resolve this tension. This tension may be more pronounced in smaller companies.

Further challenges are posed by the unique environment of each site, making a standardised ‘one size fits all’ approach to training inadequate.

It is clear that the benefits of training provision for operators need to be visibly tangible and measurable in production and safety outcomes in order for training to be prioritised, resourced and implemented.

The majority of operators did not know how to register for training and only half reported being consulted about training needs.

Large and small scrap metal companies are experiencing difficulty in either providing training or appropriate levels of training to their operators. Greater financial support is needed if training levels are to increase.

Training Needs

Helping operators understand and accurately identify their training needs is an important factor in ensuring training is effective and cost efficient. Training should not be done for training's sake – it needs to be targeted on actual identified need.

Just over two thirds of operators believed their training needs were in line with those of the company's. The other third of operators are not satisfied that their training needs are being adequately met, *“The company puts you in the job then just leaves you to find out how the job is done”*. The impact of such an approach on productivity, safety and employee satisfaction is likely to be very poor indeed. For those employees who know what training they need, too often the training is not available. When training expectations match, satisfaction levels increase.

Operators are clearly signaling a strong interest in training.

The majority of managers/professionals report they are satisfied with the level of professional development that is available to them, but agree that more training is required for operators.

Consulting on Training with Employees

Half of operators who receive training report being consulted about their training needs. Sharing in the decision-making about what training to participate in encourages trainee 'buy in' to the learning process. Consultation need not be a lengthy or protracted process; it is in-expensive and provides a raft of benefits.

Given that over a third of operators report a mis-match between their training needs and what the company perceives their training needs to be, consultation would likely produce pertinent information and more highly motivated prospective trainees.

Training Goals

The majority of operators who answered the pre-test questionnaire reported that training goals are not set prior to training. However, having managers jointly set training goals with their staff prior to training is an important ingredient for training success. It engages the participants early on with the desired learning outcomes and readies them for the training.

When training goals are not in line with the desired learning goals of prospective trainees, this mis-match can be identified immediately. The use of training goals minimises the likelihood of training not meeting the needs of its trainees.

It is a very cost effective option which should be an accepted and routine practice.

Organising Training

The majority of operators want training conducted on-site during work hours. A number of operators suggested that training would be most effective and least disruptive to the site if it was organised so that only one or two operators were being practically trained on-site at any one time.

Training and Professional Development Deficits

Operators reported a number of areas where they would like to receive more training. Of concern is the request for more safety and first aid training. A significant number of operators would like training which focuses on improving skills, notably in the area of metallurgy and HT/forklift licences. Some operators made note of a need for non-technical skills such as customer service skills, people skills and the skills to be “*cool and calm*”.

The benefit of having operators with skills which enable them to move between jobs to fill in for absent staff was also reported.

Generally managers/professionals were satisfied with the level of professional development available to them but agreed that more training was needed for other employees.

Training Delivery

On-site practical training is the preferred delivery method for most operators. Given the nature of the work performed by operators this is also the most effective for a lot of the training required. Practical training also eliminates any potential difficulties with staff literacy levels.

Literacy problems for staff, which managers/professionals estimate affect between 10%-60% of workers is likely to impact on theoretical training. Training delivery would need to be designed with literacy problems in mind.

Operators were very clear in expressing the attributes required of a good trainer. This is a group who do not like being patronised or talked down to. For trainers to be effective three factors emerged;

- Trainer professionalism- experienced and knowledgeable in the industry
- Personal qualities- patient and down to earth
- Effective communication skills

Managers/professionals were in agreement that the best place to look for trainers is within the industry given the high priority placed on experience and knowledge. They also agreed that trainers would need a 'Training the Trainers' programme to develop their skills for engaging with trainees.

The importance of having staff implement the skills learnt in training as soon as possible appears to be mostly understood. However, some operators still report a long time lag between training and applying skills, thus undermining the value of the training. Even more worrying, some operators report only receiving training once problems have been encountered with equipment.

Future Delivery for EXITO

None of the companies surveyed reported using EXITO in any of their training.

The feedback by operators to EXITO made it very clear that they want a louder voice in the training that is organised, and in ensuring their access to it. Operators' want recognition of their expertise and on-the-job knowledge and the opportunity to use this to contribute to the shape that future training takes.

One of the challenges faced by EXITO in delivering training may be in navigating the secrecy that traditionally surrounds the scrap metal industry. In a competitive market place, scrap metal companies have carefully guarded their trade secrets in order to retain their competitive edge. The need to provide training that is both generic to the industry as well as meaningful to individual sites without compromising trade secrets will need to be handled sensitively.

Recruitment and Retention

Recruitment and retention rates do not appear to be presenting difficulties at present. Nonetheless this area still merits attention given the potential for an under-supply of workers in the future and the projected growth of the industry by managers/professionals.

Managers/professionals predicted a future under-supply of workers across the board from labour-based to management roles. It may therefore be necessary at times to recruit short-term to cover any staff shortages. Some managers/professionals reported a greater willingness to recruit staff from overseas, other industries and from outside the workforce than to recruit from under-represented groups. Examining this reluctance to recruit from this latter group may be necessary as women and ethnic groups represent a rich pool of potential workers.

Some respondents suggested that up-skilling within the organisation would ameliorate the effects of skill shortages. The advantage of having a flexible staff with the ability to move between positions has a lot to recommend it.

There are a significant number of employees in the industry with a substantial amount of experience behind them. Such people are a valuable resource and ensuring that their

knowledge and expertise is not lost when they leave the job is important, as is exploring ways in which their skills can be passed on to newer recruits.

Managers/professionals generally agreed that training and the potential for career development were useful to attract people into the industry. Most managers/professionals agreed that there is not a clear career path for operators at present and that this needs to change. While not all employees will wish to 'climb the ladder', for those who do it is vital that there is a clear path to developing and moving up within the industry. Improving operator career paths may prove a key strategy in recruiting and retaining desirable workers.

Improved training, communications, pay conditions and career potential were suggested by managers/professionals as ways of retaining staff. Those companies who report excellent staff retention may be able to provide information about their systems to those who are having less success.

A majority of managers/professionals believe an apprenticeship system should be organised for the industry. Such a system may bring benefits by enabling apprentices to develop a broad skill base.

2. Overview

During November and December 2006 and March and April 2007 the Extractive Industries Training Organisation (EXITO) national Scrap Metal Industry survey was conducted throughout New Zealand.

The Tertiary Education Commission had charged all Industry Training Organisations to take a leadership role in identifying and meeting future skill needs in the industries they represent. As a result the Extractive Industry Training Organisation (EXITO) decided to conduct a national survey of the Scrap Metal Industry to carry out research to enable planning to be carried out on the future training needs of the industry.

A total of nine sites were surveyed throughout Auckland, Wellington, Christchurch, Dunedin and Invercargill.

The purpose of the research was to:

- Identify industry skill needs for the future
- Identify areas of skill shortage/skill gaps
- Identify how to ensure equity of access to all learners
- Identify how to extend industry training to more trainees
- Gather accurate information to be able to establish a system of training which responds to current and future skill needs for the Scrap Metal industry.

It is envisaged at the completion of this project that EXITO will be able to improve its responsiveness to the needs of the scrap metal industry in terms of current and future skill needs. It will continue to have an ongoing strategic dialogue with the scrap metal industry to:

- Carry out strategic planning for scrap metal industry training, including establishing a Charter and Profile which have clearly articulated missions and plans which match identified industry needs
- Evaluate current EXITO services – to enable comparison and evaluation of services rather than making ad hoc decisions based on incomplete data and to build upon existing strengths by identifying opportunities outlined by the industry
- Increase the quality of provision of training and identify new services which focus on identified industry skill gaps
- Provide ongoing targeted services
- Allocate resources
- Carry out operational planning
- Continually improve effectiveness and efficiency of delivery

Equity of Access for Learners

The current skill shortage in many industries throughout New Zealand is of concern and is the reason the research was conducted. Consequently all avenues needed to be explored to enhance recruitment and access to training for those groups under-represented in the scrap metal industry. The project researched the numbers of women,

Maori and Pacific Island people in the industry to find out how under-represented groups within the scrap metal workforce could take up training to help alleviate some of the future skill shortages.

Consultation

During initial consultation scrap metal managers voiced concerns about operators with literacy difficulties having to complete a questionnaire. They did not want such staff to be put on the spot. As a result the surveyor offered a choice to respondents when introducing the survey by explaining that the process could be completed more quickly by the surveyor asking the questions and filling in the answers or respondents could complete the questionnaire themselves.

In practice this worked well – most people chose to work through the questionnaire themselves. A small number of operators took up the offer and gave verbal answers while the form was completed for them. In this way no one was made uncomfortable and it meant we were able to unobtrusively gather information from people with limited or no literacy skills.

Most respondents were very interested in the purpose of the survey and there was a great willingness to be involved.

Each participating scrap metal manager and/or contact person has been thanked personally for their contribution to this work and all managers involved will receive a copy of the final report once the EXITO Board has released it.

Our grateful thanks and appreciation go to all those involved in the survey.

- To the pilot-test operators and their managers at Macaulay's Scrap Metal yard, Wellington - thank you for your generosity and the many useful suggestions and responses we received to fine tune the final questionnaire.
- To the scrap metal managers and supervisors throughout the country who generously gave of their time and prepared their staff for the survey visit
- To all the respondents who participated in the survey - thank you for providing your industry with the information on which to base future planning needs for training – it was a pleasure to work with you on this project.

3. Methodology

Data Collection Method

A group administered written questionnaire was used to collect the data because it was cost effective and delivered large stores of useful information quickly and efficiently. Also questionnaires are familiar to most people and usually do not cause apprehension. Questionnaires also reduce bias because of uniform question presentation and no middle-person bias or influence. Questionnaires are an excellent method to use when:

- The need is to collect the same type of information from a large number of people.
- The collectors of the information are more interested in what a group thinks as a whole than in what a particular individual has to say.

The EXITO survey needs met these 2 requirements.

Data Requirements

The EXITO CEO and Board directed the surveyor to research specific information based on strategies outlined by the Tertiary Education Commission. This information was to be used by EXITO to plan for ensuring a sustainable and skilled workforce for the scrap metal industry.

Industry experts were initially interviewed to canvass their ideas about:

- the focus and content of the research
- how to conduct the research

Initially this phase took longer than planned as the list of people to consult grew. The surveyor kept the CEO (EXITO) informed and together they decided when to draw this phase to a close.

The questionnaire was amended based on industry feedback and as a result we produced two questionnaires – one for operators and one for managers, professionals and technical staff. The questionnaire was of a short enough length that it could be comfortably completed in one sitting.

Pilot-Testing the Questionnaire

The questionnaire was piloted with a cross-section of operators who fitted the profile of the final group to be surveyed.

A short introduction outlining the purpose of the survey was given by the surveyor on site and face to face with the pilot-test group. Participants' confidence was enlisted by providing information and answering their questions about the purpose of the survey. Minimal information was given about how to fill in the questionnaire, as we wanted to find out where any problem areas occurred. This meant that pilot-test respondents

completed the survey without any special instructions. Instead they were responding to the written text of the questionnaire, not to guidance from the surveyor.

The questionnaire was distributed, completed and collected immediately after completion.

Respondents were timed from start to finish. After completion they were asked for their reactions to the survey based on the following questions:

- Was the survey clear and easy to understand?
- Were you comfortable answering the questions?
- How comfortable were you with the time it took to complete?
- What other comments do you have?

The respondents' answers were recorded. The resulting data was used to determine whether it was the kind of information we were seeking. We considered:

- Were there responses that should have been included but were not?
- Were some of the questions redundant?
- Were questions being answered with 'don't know'?
- Were there any questions that were too complicated?
- How long did it take respondents to complete the questionnaire?

The main finding of the pilot-test was the problematic question about questionnaire length. The operator questionnaire was reduced to 2.5 pages in length and could be completed within 10 minutes. But the managers, professionals and technical questionnaire was still too long. Further amendments were made and finally a 4 page questionnaire was finalised for this group.

4. Response Rate

Response rate is the single most important indicator of how much confidence can be placed in the results of a survey. When conducting a survey at least 10% of the survey population must be included. We have surveyed 15% of the scrap metal population – enough to assure confidence in the results.

Professional surveyors find an acceptable questionnaire response rate of fifty percent or higher difficult to achieve. Given this we decided to conduct the survey on site and collect in the questionnaires immediately after completion.

We were able to achieve a 100% yield with the operator questionnaire but only a 50% yield with the manager/professional /technician questionnaire as many managers were too busy to complete the survey while the surveyor was on site. Completed questionnaires were posted back to the surveyor - even with reminders we did not receive back the full complement of what had been distributed.

The survey was conducted anonymously. Respondents were informed of the purpose of collecting the information (i.e. the questionnaire) and that the use and disclosure of the information would be limited to what was necessary to fulfill the survey purpose. We did not ask for people's names. The survey responses cannot be used to identify an individual because no personal information has been used that would enable identification of the survey respondent.

This was a wise decision as it encouraged survey participants to be more open – they knew their opinions and comments were not linked to them as individuals.

The final design of the questionnaire made it easy for respondents to participate. Occasionally some people did not include their age or pay band rate. For the respondents who indicated they did not receive training, the questions relating to training were left blank resulting in a response rate of around 60% to these questions in the operators' questionnaire.

5. Distribution of Results

The results of the survey will be distributed to all EXITO Board members, those who contributed to the survey and other interested scrap metal industry personnel.

6. Results of the Survey – Combined Operators and Managers/Professionals/Technicians

Part 1 - Demographic Data

Due to a small sample size of only seven, the managers/professionals/technicians demographics have been integrated with those of the operators as they are suitably similar to make this a valid grouping.

Total number of Scrap Metal Companies surveyed = 9

Age Distribution

The age range of respondents is reasonably evenly split over the spectrum of ages. A quarter of workers, 25%, are 25 years or younger, 40 % are between the ages of 26 - 45 and 35% of respondents are over the age of 45.

Age	Male
18 - 19	9%
20 - 25	16.4%
26 - 30	4.5%
31 - 35	7.4%
36 - 40	19.4%
41 - 45	9%
46 - 50	11.9%
51 - 55	10.4%
56 - 60	9%
61 - 65	3%

Gender Distribution

Gender	Male	Female
Total Respondents – 68	91.05%	8.95%

One female was in the managers/professionals group.

Ethnicity

75% of all respondents identified as NZ European/Pakeha, 14.7% as NZ Maori with very small percentages coming from other ethnic groups.

NZ European/Pakeha	75%
NZ Maori	14.7%
Other European	2.9%
Samoan	1.5%
Cook Island Maori	1.5%
Tongan	
Niuean	
Tokelauan	
Fijian	
Other Pacific Island	
Indian	2.9%
South East Asian	
Other Asian	
Chinese	
Latin American/Hispanic	
African	1.5%
Middle Eastern	
American	

Hours Worked Per Week

The average working week for a manager/professional is 48 hours. The average working week for an operator is 47 hours.

Hours per week	Male
Below 40	5.8%
40 - 45	49.3%
46 - 50	24.6%
51 - 55	10.1%
56 - 60	4.3%
61 plus	5.8%

Retention Rates	
Under one year	19.7%
1 - 2 years	10.6%
3 - 4 years	12.1%
5 - 6 years	9.1%
7 - 9 years	12.1%
10- 14 years	9.1%
15 - 19 years	9.1%
20 - 24 years	6.1%
25 - 29 years	6.1%
30 plus years	6.1%

30.3% of staff have been in the industry for two years or less.

33.3% of staff have been in the industry between three and nine years.

36.5% of staff have been in the industry for ten years or more.

Part 2 - Results of the Survey - Operator Questionnaire

The results following on from here are from operators only unless it is specified that both managers and operator results have been combined.

Attraction to Working in the Scrap Metal Industry

The respondents displayed a range of motivations for choosing work in the Scrap Metal Industry. These can be broadly classified into the following seven categories;

It's a job	32.7%
Enjoyment/ Interest in Machinery	30.6%
A family/friend connection	16.3%
For the money	10.2%
Was offered work	10.2%

This question revealed a range of attitudes to the job as the following quotes indicate;

- *It's a good honest job, pays the bills, having fun while I'm working.*
- *Had nothing else to do.*
- *I like pulling things to pieces.*
- *No real reason.*
- *Doing something different, meeting new people, being honest.*
- *It's in the blood.*
- *Enjoy driving heavy machinery.*

Relevant Experience Prior to Entering the Scrap Metal Industry

38.6% of operators indicated they had relevant experience/qualifications before entering the scrap metal industry – 61.4% reported they had no relevant experience.

The most commonly listed relevant experience was forklift and HT licences. Other relevant experience included skills in building, plumbing, welding, sheet metal fabrication, gas cutting, iron foundry, demolition and experience working with metal.

Previous Industry Experience of Operators

65.5% of operators had worked in other industries prior to their employment in the Scrap Metal industry. 34.5% of operators had no previous industry experience.

This prior experience covered a wide ranging spectrum. A non-exhaustive list includes; carpentry, truck driving, fisheries, construction, railways, forestry, meat processing, NZ Army, drain laying, road working, transport engineering, baking, welding, printer operator, mechanic, store man, cable laying, lathe operator and Council work.

Number of Scrap Metal Companies Worked In

The majority of operators and managers/professional have worked for only one scrap metal company.

Number of Scrap Metal companies worked in	
One	81.4%
Two	16.9%
Three	0%
Four	1.7%

Promotion of Operators

31.6% of operators reported that they had been encouraged to take on foreman or supervisor roles. 68.4% had not been approached to take on such roles.

Such roles included;

- Foreman
- Yard manager
- Supervisor
- Manager
- Dangerous goods lock-up
- Health and Safety

Pay Scales of Operators

A significant proportion of operators noted annual wage rates that are below the new minimum adult wage rate of \$11.25 per hour¹. 40.5% of operators reported receiving \$15,000 to \$19,999 – Only 5.8% of this group were working part time. Given that all respondents were of adult wage rate age, and average hours of work are over 40 per week, these wage figures suggest a significant increase in costs for businesses in this industry as a result of the 1 April 2007 increase in the minimum adult wage.

Pay Scales of Operators	
\$10,000 to \$14,999	2.0%
\$15,000 to \$19,999	38.5%
\$20,000 to \$29,999	32.7%
\$30,000 to \$39,999	19.2%
\$40,000 to \$49,999	2.0%
\$50,000 to \$59,999	3.8%
\$60,000 to \$69,000	2.0%

¹ The annual salary of \$15,000 to \$19,999 noted by a large proportion of Operators is also below the 2006 minimum adult wage rate of \$10.25 per hour. This suggests either people are unaware of their annual wages, there is less weekly hours of work than indicated in earlier questions, or employers are unaware of minimum adult wage rates.)

Intention to Remain Within the Scrap Metal Industry

89.1% of all operators and managers/professionals indicated that they intended to remain working within the industry.

Part 3 - Training

Perceptions of Why Training is Provided

Nearly all operators agreed that safety and the improvement of skills were the reason companies provided training.

Other reasons cited for training were:

- *Filling in for other staff members*
- *Future job prospects/ promotion*
- *To further the growth of the industry/company*
- *Professionalism*
- *Improving understanding of the industry and job outlook*
- *Efficiency*

Interest in Training

A very high level of interest in training was reported. Almost all operators indicated they were interested in training compared with only three who said they were not.

One third of the respondents reported that they were **required** to participate in training while two thirds said they were **encouraged** to do so.

Purpose of Training

Approximately 50% of operators agreed that gaining more skills and having a safer workplace were the most important aspects of training. Next most important was doing training would mean a greater chance of promotion. Other expectations of training were;

- *Realise company/industry goals and aims*
- *More pay if I help the company earn more money*
- *People skills*
- *To know the metals*

Not all operators responded to this question. One respondent noted his only training had been learning “*how to do things on the job myself*”.

Extra Training Required

42.6% of Operators felt that there are needed skills for which they do not receive training.

The most commonly identified skill needs are in:

- Metallurgy
- Licenses (HT, forklift,)
- First Aid/ /Safety
- Heavy machinery operation

Other skills include:

- Export and sales
- Quality customer services
- Product knowledge
- Computer skills
- People skills

Registering for Training

Of the respondents who answered this question, 67% reported that they did not know how to register for training, while 33% said they did.

Consultation on Training Needs

The operators who responded to this question were evenly divided, with half saying they were consulted on training needs while the other half saying they were not.

The Match between Operator and Company Perceptions of Training Needs

A poor response rate of one third was received for the question of whether there is a match between operator and company perceptions of training needs. The majority of those who responded, 67%, feel that there is a match while 36% of operators do not feel that there is. This latter group made the following comments;

- *I'd like to be trained on some of the other machines but it has to be done by a trained operator on the job. We are flat out all day and we work a ten hour day so no-one wants to stay behind at the end of the day to train me – even if they get paid for it. So I end up not getting the training. It's disappointing.*
- *The company put you in the job then just leaves you to find out how the job is done.*
- *My job is a dead-end job. It is finite and limited – there is no way up.*
- *There is no training for office staff.*
- *I would like more training, especially in operating.*
- *We should be notified of any law changes we need to know.*
- *You get told to go.*

- *There should be something put in place to operate a Hiab. The significance is that we operate in very close quarters – a novice in this situation can turn very nasty. Safety conditions are extremely important.*

The following two questions were only asked of those 21 operators doing the pre-test questionnaire. They were deleted from the final questionnaire.

Selling Training

There were ten responses to the question of how training is sold to operators. These demonstrated a range of differences in how training is offered to workers;

- *Told to turn up.*
- *Asked if you'd like to do it.*
- *By word of mouth.*
- *We think this course is relevant, please read these papers and get back to us.*
- *It will benefit the individual.*
- *Talk to me about it.*
- *Get there.*
- *Individually.*
- *To help you in the industry.*
- *We get asked.*

Setting Training Goals

Of the 11 operators who responded to this question eight reported that no training goals were set prior to training.

The Best Time for Training

Number Who Agreed (Could tick more than one box)	
During work hours	86%
Evenings	9%
Weekends	5%

Those who answered the pre-test questionnaire had the following to say on how training could best be organised:

- *Organise with the manager.*
- *Night school is no good – too tired as we work long days.*
- *Whatever is necessary!*
- *Definitely work hours.*
- *On the job.*
- *Should be in my time, if I can take it with me.*
- *Going out to it.*
- *Paid for after hours.*
- *Half paid for.*
- *Block course.*

Operator Suggestions for EXITO Training and Skills Development

Some of the 21 Operators who were part of the pre-test survey made comments on what the EXITO industry training and skills development need to be doing by 2012;

- *This industry is too lax re safety. It scares me. Provide a lot more training.*
- *Allowing industrial staff to fill out questionnaires requesting law changes involving safety issues.*
- *Need to be able to give feedback about law changes and if they are working.*
- *Talking with the workers and asking what they would like.*
- *We should be sent questionnaires about input from people out on the job. We do the work.*
- *Making sure you have the right training for your job.*
- *For whatever training we need.*
- *Go for training which is confidential at each site. We lose our edge when a staff member leaves; it's a pretty delicate situation.*
- *Good training input.*

Part 4 - Training Delivery

The majority of operators reported on-site practical training as their preferred training environment.

Preferred Training Delivery	Number Who Agreed (respondents could tick more than one box)
Self-paced learning	7
Classroom presentations	15
On-site practice/practical	46
Use of video	12

Comments on training delivery were as follows;

- *Training besides a foreman to watch for safety.*
- *Practice and theory. It depends on the topic.*
- *One-on-one.*
- *Lots of things in this industry can't be learnt in a classroom.*
- *Must be on the job- where we do all of our work.*

Theory and Practice Balance

To the question of theory and practice balance, 78% of Operators agreed that there is the right mix between theory and practice in their training. 22% did not; some felt more practice was needed while others commented that there was no theory in their training. Some operators noted a lack of *any* training in their workplace.

Preferred Trainer Attributes

Operator's rate experience as the most important attribute in a trainer, with knowledge and supportiveness also highly rated.

Preferred Trainer Attributes	Number Who Agreed (respondents could tick more than one box)
Knowledgeable	29
Experienced	34
Supportive	27
Allows time to learn	16

The respondents were very forthcoming in their views of what factors are required of a good trainer. Patience was the most frequently listed attribute, followed by relevant experience and the ability to communicate clearly without talking down to staff. The following comments are a selection of those made by operators.

- *Patient, supportive, not putting you down or yelling.*
- *To be on the same level as you and know what he or she is doing.*
- *Good skills, communication, someone that's done the job.*
- *Patient. Gets message across, not arrogant.*
- *Best way of teaching is talking and showing – practice, practice, practice.*
- *An experienced joker, not a young one.*
- *Patient, not arrogant.*
- *Patient, no yelling.*
- *Nothing worse than having a young guy telling you stuff out of a book.*
- *Prepared to listen.*
- *Down to earth.*

Ideas for Improving Training Delivery

The operators had a lot of suggestions for improving training. Issues impeding the effectiveness of their current training were also identified. Many of the operators commented on the need for experienced trainers to provide on-site instruction to just one or two people at a time. Issues around the need for adequate time to be allocated to training as well as practice and follow-up in order to retain the skills learnt were also raised.

- *When you are working yourself and trying to train someone it's hard to do.*
- *When we first start we should spend a whole week getting inducted from a person that knows.*

- *There is not regular stuff coming in, so you can get trained on something and then you might not see it again for 12 months - it is a problem retaining the learning.*
- *Employees should be trained in their own job before learning other people's. The five minutes training I was given was in how to do someone else's job, not my own. I was told off by two different people for asking to be trained in my own job first.*
- *One size doesn't fit all. There's a need to be able to generalise training across the board because every situation is different.*
- *Need to follow up after training, but they don't so it's a waste of money.*
- *By using people with experience in the industry.*
- *More time to practice.*
- *Making it enjoyable.*
- *To make sure the trainer has had first hand experience he or she is doing the training in.*
- *Hands-on approach with expert supervision.*
- *One-on-one on the job training – too busy to have more than one or two people train at one time.*
- *Having more of it.*
- *On the job training is best because you are with the stuff – you can see the materials. Important to have everyone trained on all machines – no problems if someone is sick because everyone knows it.*
- *Make sure we have something to read before we are sent on a course to outline what we are doing, info to know what to expect when we get there or a video to see beforehand.*
- *Make it site specific.*
- *Hands-on approach with expert supervision.*
- *On-site training with all equipment so all can use it.*
- *In pairs on-site.*

Time Frames for Training on New Equipment

When Receive Training on New Equipment	Responses
Before it is delivered	11%
After it is delivered	83%
When it starts causing problems/faulting	6%

Comments were also received regarding training on new equipment.

- *No training yet.*
- *Before it is delivered would be safer.*
- *Must be trained before going on machine.*
- *Depends on licences.*

Length of Time between Training and Implementation of New Skill

This is a crucial factor in the success of training. If people do not use their skills immediately following training, retention of the learning falls quickly away. The following table shows there is considerable room for improvement to this aspect.

Days Since Completing Training	Number of Responses
1 – 5 Days	67%
A fortnight	5%
A month	5%
More than a month	7%
Other	16%

Three of those in the ‘other’ category commented that implementing the new skill could take place immediately. Other comments were as follows;

- *Dictated by management.*
- *Depends on the skill you’re training for.*
- *All depends on how the operator is going – some people are gifted but there are safety risks. Try to get them to us it straight away.*
- *Depends on whether I use it regularly.*

Experiences of Distance Learning (learning by correspondence or internet)

The majority of operators reported that they had never experienced distance learning by correspondence or the internet, while six had. Of those six, five found it to be a useful learning method.

- *I can take my time doing it.*
- *Do it at my own pace.*
- *I don't like classroom learning.*

Conversely, however;

- *Questions can't be answered straight away.*

6. Results of the Survey - Managers and Professionals

Part 1 - Demographic Data

Response Rate

Only a small number of respondents (7 managers) completed the questionnaire.

Industry Experience

The industry experience of this group covers a wide spectrum with two having been in the industry for less than a year while two have between 30-40 years of experience.

Relevant Experience/Qualifications

Managers were asked whether they worked their way up to management from the 'coal face' or gained a professional/management qualification and started in the industry as a manager. Most managers started their careers at the 'coal face' without prior relevant qualifications or experience. Two respondents reported relevant qualifications prior to entering the industry – they had university degrees.

Pay Scales

The pay scales for managers varied widely. This is influenced by the size of the company. The variation in pay was; one manager in the \$20,000 to \$29,999, bracket, four managers were in the \$40,000 to \$49,999 and two earned over \$70,000.

Part 2 - Professional Development

Professional Development Needs

The majority of managers/professionals felt that there was a match between their professional/training development needs and what the company thinks they need. One felt that a match was not achieved.

Participation in Professional Development

Nearly all managers feel supported to participate in professional development and that that professional development adds value. However one respondent cited "*a lack of enthusiasm*" as a barrier to participating in more professional development. All reported participating in professional development due to choice rather than being told to. Six of the seven Managers agree that professional development fits with where they want to go in their career.

Gaps in Professional Development

Two managers identified gaps in professional development areas, that is, skills needed which are not being developed.

- *Training time for management.*
- *Develop workplace efficiency.*

Part 3 - Recruitment and Retention

Under and Over-Supply of Labour

Respondents reported a number of skills/occupations that are likely to be under-supplied in the future.

- *Any labour-based role.*
- *Management – an outside manager can't merge in, it is a very unique industry.*
- *Skilled staff.*
- *Drivers, good machinery operators.*
- *Metal sorting and grading, gas cutting and demolition.*
- *Traders, reps (trading) don't have the skills to move into management.*

There were fewer areas believed to face an over-supply of labour in the future. Some respondents did not think that any over-supply would exist.

- *An office administration role.*
- *Unskilled labour.*

A number of reasons were offered for the issue of under and over-supply.

- *The focus on education on getting a 'career' with an emphasis on computer skills etc., so any labour orientated profession is viewed as a last resort, or for 'drop-outs'.*
- *No formal qualifications exist.*
- *Takes too long and costs too much for young people to get licences.*
- *Labour Government.*

Recruiting Staff Short-term

Respondents were asked about the feasibility of filling short-term staffing gaps by recruiting staff to fill short-term skill shortages while people receive the formal training they need to take up future vacancies.

Recruit Staff From:	Yes	No
Under-represented groups (e.g. gender, ethnicity, age)	3	3
Other industries	5	1
Out of the labour force	5	1
Overseas	5	1

Respondents had further suggestions to remedy any expected skill shortages.

- *Upskill the people who already work within the organisation.*
- *Encourage frequent training and movement within positions.*

Changing the Image

Most respondents feel the Scrap Metal industry is in need of an image change. Of those who feel a change is needed the following suggestions were put forward:

- *Get the public to identify it for the professional industry that it is.*
- *To be cleaner and greener and good for the environment.*
- *Employ quality staff and equipment, and treat this industry as a respectable business.*

Secrecy versus Co-operation

Half of the respondents felt that the industry need to work together more co-operatively while the other half do not. Of those who felt that secrecy was impeding the industry – they reported that working co-operatively does not mean having to share economic information with competitors. They felt that working together to improve such things as ‘industry image’ and improving training would benefit the whole industry and would not put profitability at risk.

Apprenticeships

Two thirds of the respondents agree that an apprenticeship system should be organised for the industry. They felt that the work has enough complexity and variety to warrant offering apprenticeships.

Operator Career Paths

The majority of respondents agree that there is not a clear career path for operators in the industry at present. All were unanimous in believing that a clear career path for operators should be put in place.

Finding Skilled Trainers

In considering how the industry will find good trainers all the respondents agree that the place to look is within the pool of people already working within the industry.

- *Drawing on experienced ones already in the industry would be the most effective.*
- *Use already skilled people in the industry.*
- *Retention of senior staff.*

‘Train the Trainers’ Programme

All respondents agreed that industry trainers will need a “Train the Trainers’ programme so that they can effectively engage and motivate training participants.

Designing Training to Meet the Unique Needs of Industry Sites

Respondents commented on the impact on training delivery posed by the unique requirements of individual sites. This was an on-going theme amongst managers. They are concerned that training once in place, may overlook this crucial factor. They cautioned that if training is not tailored to individual site differences and methods it would be only minimally successful.

- *It will be difficult to create a standard because of the different types of businesses.*

Respondents put forward solutions to manage the impact of this on training delivery.

- *Delivery will need to be varied, and ‘basic’ information streamlined so it can be applied in any sized yard/site.*
- *They will need on-site training.*
- *Trainers will need to find out beforehand the methods used at individual sites.*
- *Communicating what is expected in the role and how to perceive the position.*

- *People need to understand the core attributes that make industry components similar.*

Attracting People into the Industry

A range of approaches were put forward to encourage people into the industry, these tended to stress improving career paths and pay.

- *Push the idea they will be trained and the industry will advance.*
- *Highlighting the potential career possibilities, offering recognised qualifications, working in a professional manner.*
- *Better pay, better qualifications.*
- *Better image for the industry.*
- *Show that professional development can occur and that such work in this industry is rewarding. Pay people what they are worth.*
- *This job interests certain types of people. It is difficult to identify them by the interview process.*

Attracting Women into the Industry

There are a very small number of women working as operators. The respondents are open to the idea of employing women; however, they identify a number of barriers that they believe may prevent women from entering the industry. Ideas for overcoming these barriers include changing the culture and image of the industry as well as improving pay.

- *It's a very physical workplace, may be difficult. But need to change culture that exists in the workplace environment - that is a very difficult task.*
- *Offer them jobs and forget the image that this is a man's job.*
- *We have had women and they are very good, but it's hard to get many that want to work in this environment. Maybe a better image.*
- *By sites becoming more modern with better facilities.*
- *The women I've employed as operators are worth their weight in gold*
- *By more money.*
- *There are more men but women would be welcomed in if they applied. I think it just isn't an attractive job for them.*

Improving Staff Retention

For most respondents, staff retention is not an issue. They gave the following suggestions for how to improve staff retention.

- *More training, better wages.*
- *Fringe benefits.*
- *Positive encouragement and a chance to better their personal career within the industry.*
- *Staff need to be kept informed and involved in operations.*
- *Normalise working hours.*
- *Upskill and develop people.*

Succession Planning

Two thirds of respondents felt succession planning is adequately managed in their company. One third did not agree and would like to see a system for succession planning instigated in their company.

- *Need staff who want to move up – most just seem content.*
- *Dedicate time to understanding upstream roles and activities.*
- *It's important to value staff and help them progress.*
- *Let staff know we are looking at how they can progress.*

Getting Small Companies Involved in Training

A number of factors were recommended by respondents to help small companies participate in training programmes. These suggest a need for both resources and attitudinal change.

- *Encouragement and clear results from companies that have participated.*
- *An experienced tutor from a bigger organisation.*
- *Planning.*
- *Low-cost, short time off work for employees.*
- *Money – funding*

- *The right attitude from organisation heads.*

Part 4 - Training Issues for the Company

The Value of Training

Everyone saw value in providing training and reported a number of substantial benefits that result from training. Notably these include increased safety for all employees and greater productivity.

- *Productivity/ job satisfaction.*
- *Productivity, improved safety, customer service.*
- *Stay in job long-term.*
- *Safer workplace, more efficient.*
- *Better throughout, higher standards of products, less accidents.*
- *Can cover gaps due to sickness.*
- *Increase skill base and problem-solving ability of the firm.*
- *Increases our ability to be flexible*
- *Safety and decreasing the operational slack.*

When asked to identify where the value in training is *most* shown the respondents reported tangible improvements in the areas of productivity, problem-solving and safety.

- *Increased productivity and initiative because people have the skills to reorganize and combat problems without waiting for the boss.*
- *Greater efficiency.*
- *Higher productivity.*
- *Job satisfaction means that staff motivation is increased therefore you have a more productive environment and a more efficient workplace.*
- *Improved safety with machinery.*
- *Staff are equipped to solve problems.*
- *Customer service, safety, better work skills, better operators.*

Barriers to the Provision of Professional Development/Technical Training

Overwhelmingly the respondents rate time as the most significant barrier to the adequate provision of training. All of the managers mentioned time as the key factor affecting training; this included both the time of the managers and the operators. They reported that they work on tight margins and that any time taken which is not directly affecting the bottom line is problematic. However as is reported above managers are keen to have staff participate in a more robust training system. This means getting comfortable with the idea that the long term benefits of training will have a positive effect on the bottom line.

- *Time allocation by management – simply cannot take enough time away from their job to dedicate towards training people.*
- *Time for workers.*
- *Time and the right people.*
- *Taking time out to do training is difficult.*

Provision of Training

Two thirds of respondents did not feel there is enough professional development/training being provided for managers and senior people working in the industry.

Attracting Staff into Training

The respondents reported a range of differences in how they attract staff into training. Some companies outline the benefits to staff, pay for their training and make it mandatory. Others promise advancement in pay rates or progression on the job and others show employees what can be achieved through proper training to motivate them to participate fully.

Training Outcomes

Only half of respondents report they are achieving the results they want from training while half say they are not. This situation needs immediate attention so that everyone is benefiting from training. Part of the problem for managers is they report that some external trainers are certifying trainees as competent when in fact the training has not ensured the required level of skill proficiency – i.e. from the manager's perspective. This is an example of where co-operation and less secrecy between companies would be a useful benefit. If one company employs an external training consultant and they do not measure up then this information could be shared with all scrap metal companies to ensure inadequate trainers are not used by anyone in the industry. This type of action could help to raise the standard of external trainers.

- *Often staff are 'passed' without adequate testing to ascertain that they have achieved the required knowledge base.*

- *Because it [training] is not being done.*
- *Sometimes outside trainers are not committed.*

Strategies for Trainers to Cope with Unique Sites

Trainers face the challenge of delivering training to sites which have different work processes unique to the individual business. Overcoming this hurdle to deliver site appropriate training requires research and planning. Trainers delivering to the scrap metal industry will need to research types of work and methods of practice before they design training programmes. They must communicate well with those on site who are organising training to ensure they are tailoring their training to that site. Trainers must recognise when they are unable to provide site specific training and either find an appropriate trainer or communicate that they are unfamiliar with a specific method. In this instance another trainer with the appropriate knowledge will need to be sourced. Respondents commented:

- *Be flexible and prepared. Know the site before you go.*
- *Individual training for individual sites.*
- *Most are very similar in many aspects.*
- *Take the time to find out the specific methods used by the industry.*
- *Need to have good knowledge of all aspects of the industry.*
- *Identify them through analysis and observation then tailor to suit.*

Training Delivery

There was a mixture of opinion about the length of training delivery. Half of the respondents felt that training should be delivered in one or two day modules, while the others said it should be longer or shorter depending on the topic.

Skills Related to Managing People, Work Relationships and Leadership

For those in supervisory and management positions, part of the role includes managing people, work relationships and providing leadership. In describing the skills necessary to meet this task most respondents emphasised the need for communication skills, people skills and conflict resolution skills. Patience, flexibility, experience and knowledge were also mentioned as necessary skills.

Mostly managers felt they were not receiving very adequate training in these areas. However they see the value of such training but are not hopeful that it will become a priority in their company.

Training Providers

None of the respondents report using EXITO for training in their company. Half of the respondents run non-EXITO training using their own staff and a small number use external consultants to provide training. One respondent indicated no training took place at all.

Environmental Management and Health and Safety Training

Environmental management is an increasingly important reality in today's climate. Respondents were asked to identify the environmental management training needs to be put in place for the future.

- *Communication and audits.*
- *An encouraging rather than enforcing approach, simple yet effective strategies.*
- *Training in environmental management.*
- *Need awareness of the environmental issues.*
- *The removal of waste products.*

Similarly, respondents were asked to identify what is needed for the future training of Health and Safety.

- *On-going training for all staff.*
- *Communication and audits.*
- *General all-round skills.*
- *Encouraging rather than forcing, simple and effective strategies.*
- *Management commitment to all legislation.*
- *The importance and gravity of causing harm to yourself via careless actions.*

Staff Literacy Levels

Respondents were asked what percentage of their staff face literacy problems. Responses ranged between 10% and 60% depending on the company. These are high figures and will need to be taken into account in the design and development of training modules. The use of visuals in training material and exercises which require less rather than more reading will be essential. Companies would also be wise to consider the benefits of providing literacy training with the help of EXITO.

Forecasting Growth and Technological Advances

Predictions of growth for the scrap metal industry over the next five to ten years ranged from 15% to 50% with an average of 31% growth. Again these numbers point to the need for robust and accessible training for staff so that companies make the most of their people to achieve greater productivity.

Respondents speculated on major technological advances that may impact upon the industry over the next five years.

- *Better machinery.*
- *More mechanization.*
- *E-waste increases as new products are developed.*
- *Instant ordering of bins and stock via the internet.*
- *Computerisation of systems.*
- *Upgrades on current machines.*

Respondents offered the following ideas to ensure training is up-to-date with these technological advances.

- *E-waste recycling needs to be fully established, which will be difficult currently.*
- *Operator training.*
- *Trainers come in to train managers and be technical support.*
- *Allocate time dedicated to training staff towards these advances.*
- *Time.*

Expectations of EXITO Training by 2012

Respondents are keen to see that EXITO is providing quality training and effectively managing training for the scrap metal industry once it is up and running and that they do this on an on-going basis into the future.

7. Recommendations

Recommendations have been made but are not prescriptive. In addition each recommendation topic includes a list of questions to prompt and extend the thinking and options generated for future training improvements.

Recommendations have been made with more reserve where the managers/professionals are concerned given their small sample size.

Part 1 – Demographic Data

Gender

There are very few women working within this industry. However, on the few sites where women are employed as operators their managers speak very highly of their competence and efficiency.

Feedback from managers/professionals showed little resistance to the idea of women operators. While attitudinal barriers to employing women appear to be minimal, most of the respondents expressed the view that the industry is intrinsically unappealing to women. Some suggested a change of image and culture may be necessary to encourage more women into the industry. A useful source of intelligence would be to explore the issues with those women already in the industry. A review of what, if anything, is currently being done to attract women into the industry may also be needed.

Encouraging women to become operators could be one way to reduce recruitment difficulties in the future. There is also a range of reported benefits for any workforce that moves from a single gender population to a mixed gender population.

Questions to ask:

- 1. Why are there not more women operators in the Scrap Metal industry in New Zealand?**
- 2. How could employers be encouraged to consider both genders when undertaking recruitment? What could be done differently to publicise scrap metal careers to women?**
- 3. What additional recruitment methods may be needed to attract in women?**
- 4. What can be learned from the women who work in the industry?**
- 5. What can be learned from the experience of NZ scrap metal companies who employ women?**
- 6. Could an apprenticeship system be a pathway for encouraging women into the industry?**

Ethnicity

While the ethnic diversity apparent in the scrap metal industry broadly reflects that of the general population, there is still rich scope for attracting more ethnic groups into the industry. The reputations of new migrants as conscientious and hardworking fit the profile needed for scrap metal work. Given that this group often has difficulty finding work as new immigrants how could they be encouraged into the scrap metal industry? There were lower numbers of Pacific Peoples employed in the industry than might be expected; more consideration into how this group could be attracted into the industry also merits attention.

Those in the management/professional group were all NZ European/Pakeha. Given that 16% of operators are Maori, one might expect to see some Maori represented at the management level, especially given the increased educational achievements of Maori over the last 20 years.

Questions to ask:

- 1. How could employers be encouraged to consider selecting more widely when undertaking recruitment?**
- 2. What could be done to attract more Pacific People and other ethnic groups into the scrap metal industry?**
- 3. What additional recruitment methods may be needed to encourage more diversity of ethnic groups into the industry?**
- 4. What can be learned from Maori and other ethnic groups who do work in the industry?**
- 5. What can be learned from those companies who employ a more ethnically diverse workforce?**

Age of Work Force

The age of the workforce is not a major issue for the scrap metal industry at present. However, it is of interest that the average age of workers is significantly higher than that estimated by most managers. Due to the extensive industry experience of many employees, succession planning is an important factor for companies to plan for when employees retire or leave the workforce.

Questions to ask:

- 1. How are the knowledge and skills of very experienced operators and managers/professionals passed on to younger employees before they retire?**
- 2. What is the impact of the above question on how training needs are planned?**

Attraction to the Scrap Metal Industry / Pay Rates

Only a small number of operators cited remuneration as the motivating reason for working in the scrap metal industry. While it is '*just a job*' to many operators, an equal number reported positive reasons for working in the industry ranging from enjoying working outside to an interest in scrap metal. A sizable number also reported family/friend connections that had brought them to the industry. Understanding the non-financial reasons that are attracting and retaining operators in the job may assist both in retaining workers and in promoting the industry to new recruits.

Most operators are working long hours for generally low wages. A number of managers/professionals suggest paying operators more to attract and retain skilled workers.

Questions to ask:

- 1. How can pay rates and job conditions be used in tandem to attract professionals and operators into the industry?**
- 2. How can the non-financial reasons for being attracted into the industry be better understood and promoted to those who may wish to take up employment in the scrap metal industry?**
- 3. Is the process of wage progression transparent to operators?**
- 4. How does skills-based wage progression encourage the up-skilling and retention of operators?**

Future Career Aspirations

An astonishing 90% of all respondents signaled their intention to remain working within the scrap metal industry. This is an excellent vote of confidence for the industry. It is of interest however, that the statistics indicate that just over 30% of operators have been employed for two years or less. While some of this may be new recruitment due to industry growth, it nonetheless suggests that companies can not afford to become complacent about staff retention.

Good staff retention means an investment in training is likely to be well returned.

Questions to ask:

- 1. Given that many respondents are committed to the industry how can training provision be used to develop their skills and motivate more to take on greater responsibilities?**
- 2. Does providing a clear career path affect the retention rate of operators?**
- 3. How can managers continue to encourage and develop a loyal workforce?**

Relevant Experience before Entering the Industry

Most operators did not have relevant experience prior to entering the industry. The relevant experience most identified by operators was the holding of HT/forklift licences.

Questions to ask:

- 1. How could EXITO support more people to obtain appropriate licences?**
- 2. Could an induction programme speed up the process of learning the skills necessary for the scrap metal industry?**

Encouragement to take On-Site Responsibility

Just under a third of operators are encouraged to take on foreman or supervisory roles.

Questions to ask:

- 1. What systems are in place to identify and support those operators who wish to take on further responsibilities?**
- 2. Is further support needed from EXITO to support the development of managers and supervisors?**

Recommendations - Part 2 – Training

Operators understand safety is the number one reason for training, followed closely by improving skills. In an industry which works with heavy machinery, with the potential for dangerous accidents, this indicates that the importance of safety is understood. However, it is of grave concern that a number of operators report getting no training while others felt more safety and first aid training were required. As one operator commented, *“This industry is too lax re: safety. It scares me”*.

The connection between effective training and safety is well recognised; while the managers/professionals accept this in theory it is clear that some are not adequately implementing this knowledge in practice.

Operators reported a lot of interest in training and, as is suggested by the high number of people who wish to remain in the industry, there is a significant interest factor inherent in the work itself. The key expectation operators had for training was to increase their skill levels (followed by a safer workplace). A number of operators spoke with pride about their ability to identify different metals and work with heavy machinery. They see training as the best way to improve their skills and expertise and they want the opportunity to do more training. Some were even prepared to train unpaid in their own time. While many operators are receiving training there is another group who are not.

Encouragingly, managers/professionals report a raft of significant benefits that come from training, including increased productivity, safety and problem-solving abilities.

There is obviously no obstacle to the idea of employees receiving more training, yet two thirds of managers/professionals report not enough training for operators is being provided.

The single biggest barrier to receiving training cited by respondents is finding time for it. Training must be accommodated into the already pressured demands of the work day. Balancing training against operational needs is a key issue for the scrap metal industry to grapple with and further strategies need to be found to help resolve this tension. This tension may be more pronounced in smaller companies.

It is clear that the benefits of training provision for operators need to be visibly tangible and measurable in production and safety outcomes in order for training to be prioritised, resourced and implemented. One respondent commented on the lack of rigour required to 'pass' some training, therefore compromising confidence and results in the training process.

Further challenges are posed by the unique environment of each site, making a standardised 'one size fits all' approach to training inadequate. While this is not an insurmountable issue it does highlight the need for trainers to possess a great deal of knowledge, experience and flexibility. In order for training to deliver the required results trainers will need to be well acquainted with the idiosyncrasies of each site. Finding trainers suitably equipped to meet these demands will be an important factor in securing successful training outcomes.

The level of secrecy that traditionally surrounds the scrap metal industry may need challenging in order for companies to reap the benefits of a co-operative approach to learning about best practice in areas such as safety, recruitment and training provision. Managers/professionals were evenly split on the issue of whether more co-operation is needed in the industry. Participation in this survey is itself an indication of a willingness to pool knowledge.

The majority of operators did not know how to register for training and only half reported being consulted about training needs. This indicates poor communication and systems and is likely to impact on employee satisfaction.

Large and small scrap metal companies are experiencing difficulty in either providing training or appropriate levels of training. Greater financial support is needed if training levels are to increase.

Questions to ask:

- 1. What can be done to improve financial support for training?**
- 2. Is there a role for EXITO to play in supporting companies to provide more training?**
- 3. How can training be made accessible to all employees?**

- 4. What can be done to highlight the impact of training on production rates?**
- 5. What can be done to sell training as an effective way to support production rates?**
- 6. How can the organisation of training be improved to ensure adequate momentum so learning gains are not lost?**
- 7. How could EXITO increase the number of suitable trainers? What can be learnt from those trainers who have excellent reputations?**
- 8. What factors need to be in place to enable small companies to take advantage of training being offered? How could these factors be realised?**
- 9. What can be done to ensure all employees working in the scrap metal industry know how to access appropriate training?**
- 10. What could be done to sell the importance of training to those who do not yet understand its benefits?**
- 11. What are the benefits for companies of developing more communication and co-operation with others in the industry?**

Training Needs

Helping operators understand and accurately identify their training needs is an important factor in ensuring training is effective and cost efficient. Training should not be done for training's sake – it needs to be targeted on actual identified need.

Just over two thirds of operators believed their training needs were in line with those of the company's. Another third were not satisfied that their training needs are being adequately met, "the company put you in the job then just leaves you to find out how the job is done". The impact of such an approach on safety, productivity and employee satisfaction is likely to be very poor indeed. How do employees know how well they are performing in each aspect of their job? Are employees receiving regular constructive feedback and how is this information connected back into training requirements? For those employees who know what training they need, too often the training is not available leading to frustration. When training expectations match, satisfaction levels increase.

A number of respondents, both operators and managers, reported the advantages of having a skilled and therefore flexible workforce that could provide cover for operators in time of sickness and staff shortages.

A group of operators is clearly signaling that their training needs are not being met and that this is impacting on their ability to work to their potential. Further consultation and commitment to training this group is required.

A clear understanding about safety training and its effect on accident rates within the industry is needed. There is much to recommend a system whereby those in the industry can share information on what safety training works well and what doesn't.

Questions to ask:

- 1. How are accurate training needs established?**
- 2. What could be done to include all staff in the process of training needs identification?**
- 3. How could EXITO become more involved in companies' training needs analysis and how could they more effectively use that information to respond quickly with appropriate, targeted training?**
- 4. What help does the industry require to undertake safety training for those who say it is inadequate or do not receive it?**
- 5. What has been done across the industry to identify what safety training is most effective?**
- 6. What financial support can be given to ensure safety training is designed so that it has a direct and positive impact on industry safety.**
- 7. What can those companies who do not provide much/any training learn from those who do invest in training?**
- 8. How can the effectiveness of training outcomes be guaranteed?**

Consulting on Training with Employees

A significant number of operators report being consulted about their training needs. Those respondents who share the decision with their managers about what training to attend are more likely to enthusiastically participate in training than those who are told to attend. It does mean a conscious approach by managers to have a joint decision-making discussion with employees about up-coming training. It is not costly to instigate a consultation approach and it provides a raft of benefits:

- training needs are more accurately identified
- training needs are identified more quickly for new technology or skill requirements
- greater commitment by trainees to the training
- targeted training is conducted
- skill-based pay systems work more completely
- employee satisfaction

Given that over a third of operators report a mis-match between their training needs and what the company perceives their training needs to be, consultation is a cost effective and simple strategy to minimise this mis-match.

Along with the consultation process, which could be as simple as a ten minute conversation with operators, selling the training to them is also an important factor in predicting successful training outcomes.

Questions to ask:

- 1. What role should EXITO have in educating managers in the scrap metal industry about how to effectively sell training to staff?**
- 2. What could be done by companies to change to a more the consultative approach to identify training needs with staff?**

Training Goals

The majority of operators who answered the pre-test questionnaire reported that training goals are not set prior to training. However, having managers jointly set training goals with their staff prior to training is an important ingredient for training success. If this is done it effects the warm-up participants have prior to training and this in turn affects how they respond to the training once they begin. It also contributes to the sense of achievement trainees experience at the completion of training.

In just the same way selling training affects trainee participation, jointly setting training goals greatly increases the likelihood of training success. When training goals do not match what prospective trainees want from training this can be sorted out prior to training. When such an occurrence is highlighted after training then the trainer can be contacted to find out where the mis-match is occurring and improvements can be addressed immediately.

It is a very cost effective option which should be a routine practice.

Questions to ask:

- 1. What can be done to help managers understand the positive flow-on effects of jointly setting training goals with employees?**
- 2. What type of training follow-up will best address whether pre-and post-training goals were congruent?**
- 3. What mechanisms need to be put in place to ensure managers and staff always set training goals together before training?**
- 4. How could EXITO support companies to routinely do this?**

Organising Training

The organisation of training is one of the biggest stumbling blocks to operators' receiving any/adequate training provision. Due to the long hours worked, training at the end of the day is unlikely to be effective. The majority of respondents want training conducted during work hours. A number of operators suggested that training would be most effective, and minimise the disruption to the site, if it was organised so that only one or two operators were being practically trained on-site at any one time.

The effects of training may in time help to alleviate the impact of it by developing the skill base of operators so that they are able to more easily move between jobs to cover those who are involved in training.

Questions to ask:

- 1. What are the financial implications of training on a one-to-two person basis?**
- 2. Is there a role EXITO can play in supporting companies to organise training?**
- 3. Could financial incentives be used to encourage workers to participate in weekend training?**
- 4. Do companies have any temporary workers they are able to recruit to fill the gaps when workers are involved in training?**
- 5. How would an apprenticeship system assist in providing training given the constraints on training that companies have identified?**

Training and Professional Development Deficits

Operators reported a number of areas where they would like to receive more training. Of concern is the request for more safety and first aid training. A significant number of operators would like training which focuses on improving skills, notably in the area of metallurgy and licences. Some operators made note of a need for non-technical skills such as customer service skills, people skills and the skills to be "*cool and calm*".

The benefit of having operators with skills which enables them to move between jobs to fill in for absent staff was also reported.

Generally managers/professionals were satisfied with the level of professional development available to them but agreed that more training was needed for other employees.

Questions to ask:

- 1. Is there a need for training other than technical training, e.g. people skills?**

- 2. How could an induction programme be organised to ensure workers have the necessary skills and confidence to safely begin work in the industry?**
- 3. What does EXITO need to do to identify the additional training required for major technological advances likely to occur over the next 5 – 10 years?**

Recommendations - Part 3 - Training Delivery

On-site practical training is the preferred delivery method for most operators. Given the nature of the work performed by operators this is also the most effective for a lot of the training required. Practical training also eliminates any potential difficulties with staff literacy levels.

Literacy problems for staff, which managers/professionals estimate affect between 10%-60% of workers, may impact on theoretical training. Training delivery would need to be designed with literacy problems in mind.

Operators were very clear in expressing the attributes required of a good trainer. This is a group who do not like being patronised or talked down to. For trainers to be effective three factors emerged:

- Trainer professionalism - experienced and knowledgeable in the industry
- Personal qualities- patient and down-to-earth
- Effective communication skills

These factors need to be incorporated into the trainer recruitment process to ensure that the most suitable people are employed. Without effective interpersonal communication skills and an understanding of the learning process a climate conducive to learning will not be established.

Managers/professionals were in agreement that the best place to look for trainers is within the industry. The industry is fortunate in having so many experienced workers. They also agreed that trainers would need a 'Train the Trainers' programme to develop their skills for engaging with and motivating trainees.

Most operators agreed that there was the right balance of practice and theory in training.

The importance of having staff implement the skills learnt in training as soon as possible appears to be mostly understood. However, some operators still report a long time lag between training and applying skills. Even more worrying, some operators report only receiving training once problems have been encountered with equipment.

It is important that staff have the chance to refresh skills and receive follow-up when the skill learnt is not being put into practice regularly.

Questions to ask:

- 1. Could scrap metal companies introduce effective induction programmes as soon as new employees begin working in the industry?**
- 2. What provision exists to ensure staff can practice and receive follow up to training, especially when skills learnt are not being frequently utilised?**
- 3. What standards are used to identify and recruit trainers?**
- 4. What training and development is available for trainers to improve their teaching/training skills and knowledge?**
- 5. How are trainers supported by EXITO and the industry when they are working across a range of companies?**
- 6. What type of training and development will be most effective for managers/professionals – formal qualifications, on-the-job training, secondments, peer support, individual coaching or mentoring?**
- 7. How could successful and experienced managers be encouraged and helped to provide mentoring to other staff?**
- 8. What could be done to support staff to improve their literacy levels?**

Future Delivery for EXITO

None of the companies surveyed reported using EXITO in any of their training.

The feedback by operators to EXITO made it very clear that they want a louder voice in the training that is organised, and in ensuring their access to it. They want recognition of their expertise and on-the-job knowledge and the opportunity to use this to contribute to the shape that future training takes.

One of the challenges faced by EXITO in delivering training may be in navigating the secrecy that traditionally surrounds the scrap metal industry. In a competitive market place, scrap metal companies have carefully guarded their trade secrets in order to retain their competitive edge. The need to provide training that is both generic to the industry as well as meaningful to individual sites without compromising trade secrets will need to be handled sensitively. Managers were evenly divided on the question of whether the companies should move towards more co-operative relationships with each other.

Questions to ask:

- 1. What can be done to provide training immediately a new employee enters the scrap metal industry?**
- 2. How can unit standards be introduced to benefit the training of scrap metal employees?**

- 3. What can be done to improve the work practices and skills of more experienced employees?**
- 4. How can refresher courses be made more available to operators and managers?**
- 5. How can practical on-the-job training be made more accessible to the industry?**
- 6. How can EXITO further promote careers in scrap metal?**
- 7. What can EXITO do to increase the amount of training provided to the industry without causing detrimental production outcomes?**

Recommendations - Part 4 - Recruitment and Retention

Recruitment and retention rates do not appear to be presenting difficulties at present. Nonetheless this area still merits attention given the potential for an under-supply of workers in the future and the projected growth of the industry by managers/professionals.

Managers/professionals predict a future under-supply of workers across the board from labour-based roles to management roles. It may therefore be necessary at times to recruit short-term to cover any staff shortages. Managers/professionals reported a greater willingness to recruit staff from overseas, other industries and from outside the workforce than to recruit from under-represented groups. Examining this reluctance to recruit from this latter group may be necessary as women and ethnic groups represent a rich pool of potential workers.

Fewer respondents predicted an over-supply of workers in the future, this may reflect the projected growth of the industry and the aging of the workforce population.

Some respondents suggested that up-skilling within the organisation would ameliorate the effects of skill shortages. The advantage of having a flexible staff with the ability to move between positions has a lot to recommend it.

There are a significant number of employees in the industry with a substantial amount of experience behind them. Such people are a valuable resource and ensuring that their knowledge and expertise is not lost when they leave the job is important, as is exploring ways in which their skills can be passed on to newer recruits.

Managers/professionals generally agreed that training and the potential for career development were useful to attract people into the industry. Most managers/professionals agreed that there is not a clear career path for operators at present and that this needs to change. While not all employees will wish to 'climb the ladder', for those who do it is vital that there is a clear path to developing and moving up within the industry. Improving operator career paths may prove a key strategy in recruiting and retaining desirable workers.

Improved training, communication, pay conditions and career potential were mentioned by managers as ways of retaining staff. Those companies who report excellent staff retention may be able to provide information about their systems to those who are having less success.

Most managers believe an apprenticeship system should be organised for the industry. Such a system may bring benefits by enabling apprentices to develop a broad skill base.

Questions to ask:

- 1. What improvements could be made to how manager/professional and operators roles are promoted to those who are contemplating a career in the scrap metal industry?**
- 2. What improvements to the image and culture of the industry might assist in attracting more women into the industry?**
- 3. How could the introduction of clear operator career paths assist in recruiting and retaining staff, as well as developing a more skilled workforce?**
- 4. How could the group of immigrants (both professionals and unskilled people) who find it difficult to obtain work once arriving in NZ be identified and recruited if there was a skill match?**
- 5. Which scrap metal companies have a reputation for valuing and developing their staff and how could the industry benefit from the company's experience of doing this?**
- 6. What strategies can EXITO implement which boost the amount of training for operators so that adequate staffing levels are achieved relatively quickly?**
- 7. How could an apprenticeship system be used to create a more skilled and flexible workforce?**
- 8. How could co-operation with high schools e.g. through careers days and work experience programmes, provide potential new employees for the industry?**

8. Distribution of Results

The results of the survey will be distributed to all EXITO Board members, those who contributed to the survey and other interested scrap metal industry personnel.

Appendix 1

Scrap Metal Recycling

Questionnaire for Operators

EXITO (The Extractive Industries Training Organisation) has developed this *confidential questionnaire* to gather information about the Scrap Metal Recycling Industry. Your answers will help us understand how to provide the kind of training you think the industry needs to meet the demands placed on it now and in the future.

Thank you very much for taking part in this *confidential survey*. We really appreciate your help.

Part 1 - General Questions

1. Name of Company _____ 2. Job _____

3. Your Age: _____

4. Male Female

5. Ethnicity: (tick relevant box)

- | | | | |
|-------------------------|--------------------------|----------------------|--------------------------|
| NZ European/Pakeha | <input type="checkbox"/> | NZ Maori | <input type="checkbox"/> |
| Other European | <input type="checkbox"/> | Samoan | <input type="checkbox"/> |
| Cook Island Maori | <input type="checkbox"/> | Tongan | <input type="checkbox"/> |
| Niuean | <input type="checkbox"/> | Tokelauan | <input type="checkbox"/> |
| Fijian | <input type="checkbox"/> | Other Pacific Island | <input type="checkbox"/> |
| Indian | <input type="checkbox"/> | South East Asian | <input type="checkbox"/> |
| Other Asian | <input type="checkbox"/> | Chinese | <input type="checkbox"/> |
| Latin American/Hispanic | <input type="checkbox"/> | American | <input type="checkbox"/> |
| African | <input type="checkbox"/> | Middle Eastern | <input type="checkbox"/> |

6. How many hours do you work per week? _____

7. Why did you choose this job? _____

8. Did you have relevant experience/qualifications before you started working in Scrap Metal? **Yes/No**

If yes – what? _____

9. Did you work in other industries before working in Scrap Metal? **Yes/No**

If yes – what? _____

10. How many Scrap Metal companies have you worked in? _____

11. How long have you have spent working in Scrap Metal? _____

12. Have you been encouraged to take on foreman or supervisor roles? **Yes/No**

If yes – what? _____

13. Wages - what are your wages in your current job? Tick box

- | | | | |
|----------------------|--------------------------|----------------------|--------------------------|
| \$15,000 to \$19,999 | <input type="checkbox"/> | \$20,000 to \$29,999 | <input type="checkbox"/> |
| \$30,000 to \$39,999 | <input type="checkbox"/> | \$40,000 to \$49,999 | <input type="checkbox"/> |
| \$50,000 to \$59,999 | <input type="checkbox"/> | | |

14. Do you want to continue working in this industry? **Yes/No**

Part 2 - Training Questions

1. What do you think is the reason your company provides training? Tick box

- Safety
- To improve skills
- Other

Please comment if you ticked Other _____

2a. Are you? Tick box

- Interested in training
- Not interested in training
- Required to
- Encouraged to
- Other

Please comment if you ticked Other _____

2b. What would you expect to get out of training? Tick box

- Safer workplace
- More skills
- Promotion
- Other

Please comment if you ticked Other _____

3. Are there any skills needed which are not being trained for? **Yes/No**
If yes, what are they? _____

4a. Do you know how to register for training? **Yes/No**

4b. Are you consulted about your training needs? **Yes/No**

4c. Is there a match between your training needs and what the company thinks are your training needs? **Yes/No**

4d. If not please comment. _____

5. How should training be organised to best fit in with your work? Tick box

- During work hours
- Evenings
- Weekends

Part 3 - Training Delivery Questions

1a. What type of training delivery works best for you? Tick box

- Self-paced (learning from a training booklet at your own pace)
- Classroom presentations
- On-site practice
- Videos

1b. In your training is there the right mix between practice and theory? **Yes/No**
If no, please comment. _____

2. Think about the trainer. What factors are important in a trainer? Tick box

- Knowledgeable
- Experienced
- Supportive
- Allows time
- Other – say what _____

3. What are your ideas for improving the way training is delivered? _____

4. When new equipment is purchased when are you trained on it? Tick box

- Before it is delivered?
- After it is delivered?
- When it starts causing problems or faulting?
- Not applicable

5. After you complete training, what length of time is there between getting the training and using the new skill? Tick box

- 1-5 days
- A fortnight
- A month
- More than a month
- Other

If you ticked Other, please describe the time frame _____

6a. Have you experienced distance learning? (learning by correspondence/internet) **Yes/No**

6b. If Yes, was it a useful way to learn? **Yes/No**

6c. If Yes, please give the reasons you found it useful _____

Thank you for participating in this survey

Appendix 2

Scrap Metal Recycling

Questionnaire for Managers, Professionals, Technicians

EXITO (The Extractive Industries Training Organisation) has developed this *confidential questionnaire* to gather information about the Scrap Metal Recycling Industry. Your answers will help us understand how to provide the kind of training you think the industry needs to meet the demands placed on it in the future.

Thank you very much for taking part in this *confidential survey*. We do appreciate your help.

Part 1 - General Questions

1. Name of Company: _____ Job Title _____

2. Your Age: _____

3. Male Female

4. Ethnicity: (mark appropriate box

NZ European/Pakeha <input type="checkbox"/>	NZ Maori <input type="checkbox"/>	Samoan <input type="checkbox"/>
Cook Island Maori <input type="checkbox"/>	Tongan <input type="checkbox"/>	Niuean <input type="checkbox"/>
Tokelauan <input type="checkbox"/>	Fijian <input type="checkbox"/>	Other Pacific Island <input type="checkbox"/>
Indian <input type="checkbox"/>	South East Asian <input type="checkbox"/>	Other Asian <input type="checkbox"/>
Chinese <input type="checkbox"/>	American <input type="checkbox"/>	Latin <input type="checkbox"/>
American/Hispanic <input type="checkbox"/>	Other European <input type="checkbox"/>	African <input type="checkbox"/>
Middle Eastern <input type="checkbox"/>		

5. How many hours do you work per week? _____

6. Why did you start working in the Scrap Metal Recycling industry? _____

7. Did you have relevant experience or qualifications before you began work in the industry? **Yes /No**

If yes – what? _____

8a. How many Scrap Metal companies have you worked in? _____

8b. What is the total time you've spent working in this industry? _____ (years)

9. What is your current salary range?

\$20,000 - \$29,999 <input type="checkbox"/>	\$30,000 - \$39,999 <input type="checkbox"/>	\$40,000 - \$49,999 <input type="checkbox"/>
\$50,000 - \$59,999 <input type="checkbox"/>	\$60,000 - \$69,999 <input type="checkbox"/>	\$70,000 - \$79,999 <input type="checkbox"/>
\$80,000 - \$89,999 <input type="checkbox"/>	\$90,000 - \$99,999 <input type="checkbox"/>	\$100,000 or above <input type="checkbox"/>

10. Do you want to continue a career in this industry? **Yes/No**

Part 2 - Professional Development

1. Is there a match between your professional/training development needs and what the company/organisation thinks you need? **Yes/No**

If no match, please comment _____

2a. Are you supported to participate in professional development? **Yes/No**

2b. Do you do enough professional development? **Yes/No**

2c. If no what stops you from getting enough professional development? _____

3. Does professional development add value for you? **Yes/No**

4. Did you choose to do it or because you were told to? **Chose Told**

5. Does it fit with where you want to go in your career? **Yes/No**
6. What gaps are there in professional development areas – i.e. skills needed which are not being addressed? _____
-

Part 3 – Recruitment and Retention

1a. What types of skills/occupations are likely to be most significantly under or over-supplied in the future and why? **a. Under-supplied**

b. Over-supplied

1b. What is the reason for this? _____

2a. Will it be feasible to fill short-term staffing gaps by recruiting staff to fill short-term skill shortages while people are receiving the formal training they need to take up future vacancies?

- Recruit staff from under-represented groups, (e.g. gender, ethnicity, age) **Yes/No**
- Recruit staff from other industries **Yes/No**
- Recruit staff from people out of the labour force **Yes/No**
- Recruit staff from overseas **Yes/No**

2b. What should be done to remedy any expected skill shortages? _____

3. Does the industry need to change its image? **Yes/No**
If yes – how? _____

4. Does the industry need to move from less secrecy to more co-operation? **Yes/No**
If yes – how? _____

5. Should an apprenticeship system be organised for the industry? **Yes/No**

6. Is there a clear career path for operators in the industry? **Yes/No**
Should there be? **Yes/No**

7. How will the industry find good trainers? _____

8. Will industry trainers need a ‘Training the Trainers’ programme so they know how to engage training participants? **Yes/No**

9. Because sites are unique in their requirements how will this impact on training delivery? _____

10. What are your ideas for attracting people into the industry? _____

11. If there are not even numbers of men and women in your workplace how could more women be attracted into the operator side of the industry? _____

12. What can be done to improve staff retention? _____

13a. Is succession planning done adequately in your company/organisation? **Yes/No**
13b. If not, what should be changed? _____

14. What will it take for small companies to be able to participate in training? _____

Part 4 - Training Issues for the Company

1a. What is the value of training your employees? _____

1b. Where is that value shown most? (see 1 above) (For example: increased productivity/taking initiative/customer service, improved safety) Please comment _____

2. What are the barriers to adequate *provision* of professional development/technical training? _____

3. Is enough professional development/training being provided for those working in the industry? **Yes / No**

4. How do you attract staff into training? _____

5. Are you getting the results you want from your staff being trained? **Yes/No**
If not, why not? _____

6. How will the industry find good trainers? _____

7. Will trainers need training in how to interest & motivate their trainees? **Yes/No**

8. Sites have different work processes unique to the individual business. Please comment on how trainers will need to cope with this.

9. Should training be delivered in 1 or 2 day modules or in longer modules?

1 or 2days/Longer

10. What skills related to managing people, work relationships and leadership are needed for those in supervisory and management positions? _____

11. Of your total training what percentage is?

- EXITO training _____
- Non-EXITO training run by your own staff _____
- Non-EXITO training run by outside training consultants _____

12. The importance of environmental management and health and safety is increasing. What is needed for future training in these 2 areas? Please comment.

a. Environmental Management training

b. Health and Safety training

13. For what % of staff is literacy a problem? _____

14. What percentage growth do you predict in your industry over the next 5 to 10 years?

15. What major technological advances do you think will impact upon the industry over the next 5 years? _____

16. What needs to be done to ensure training is up to date with these technological advances? _____

17. By 2012 what does EXITO industry training need to be doing? Please comment _____

Questions in Italics for Managers Only

1. If you are a manager did you work your way up to management from the 'coal face' or did you get management qualification/professional qualification and start work in the scrap metal recycling industry as a manager? _____

2. Total number of operators in your company? _____

3. Total number of supervisory positions in your company? _____

4. Total number of administration and support positions in your company? _____

Total number of management positions in your company? _____

6. What is the average age of your field workers? _____

7. What future changes may need to be made to the role of the ITO, its structure, capabilities and resources to support you - the industry stakeholders? _____

Thank you for participating in this survey