

Qualification: CIPD Diploma in Applied Human Resources

Module Name: Contributing to Resourcing and Talent Planning

Valero's approach to talent planning

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Ways to improve Valero's approach to talent planning

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Contribute to people resourcing activities

Word Count: 719 words

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By signing below, I confirm that the work/evidence presented is my own, unaided work. I understand the regulations pertaining to candidate malpractice and the action that may be taken as a result.

Signed: 

Date: 04/12/2021

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CIPD Candidate Evidence Matrix

Candidate name: Melanie Gough				CIPD Membership/registration No.: 54660544		
Qualification title: CIPD Level 5 Diploma in Applied Human Resources				Unique Learner No. (ULN): 1910141		
Unit code	Unit title	Assessment criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
5ARTP	Contributing to Resourcing and Talent Planning	1.1	Meeting with Operations Director	EV 1		
5ARTP	Contributing to Resourcing and Talent Planning	1.1	Meeting with Technical Director	EV 2		
5ARTP	Contributing to Resourcing and Talent Planning	1.2	2021 Business Plan	EV 3		
5ARTP	Contributing to Resourcing and Talent Planning	1.2	Resource Plan	EV 4		
5ARTP	Contributing to Resourcing and Talent Planning	1.2	Talent Matrix	EV 5		
5ARTP	Contributing to Resourcing and Talent Planning	1.2	Succession Plan	EV 6		
5ARTP	Contributing to Resourcing and Talent Planning	1.2	Collective Agreement between Pembroke Refinery and Unite the Union	EV 7		
5ARTP	Contributing to Resourcing and Talent Planning	1.2	National Agreement for the Engineering Construction Industry (NAECI)	EV 8		
5ARTP	Contributing to Resourcing and Talent Planning	1.3	Engineering Bursary Scheme	EV 9		
5ARTP	Contributing to Resourcing and Talent Planning	1.3	Undergraduate Industrial Placement Scheme	EV 10		
5ARTP	Contributing to Resourcing and Talent Planning	2.1	Valero Guiding Principles	EV 11		
5ARTP	Contributing to Resourcing and Talent Planning		2022 HR Business Plan	EV 12		

5ARTP	Contributing to Resourcing and Talent Planning	1.3	Apprenticeship Programme	EV 13		
5ARTP	Contributing to Resourcing and Talent Planning	3.1	Approval to Restaff/Post e-PCR	EV 14		
5ARTP	Contributing to Resourcing and Talent Planning	3.1	Email to Tracey Bryant, Manager L&D re Structure of L&D Team	EV 15		
5ARTP	Contributing to Resourcing and Talent Planning	3.2	Meeting with Tracey Bryant, Manager L&D and Karen Muehlbauer Director Refinery HR (Acting)	EV 16		
5ARTP	Contributing to Resourcing and Talent Planning	3.4	Revised Associate Technical Trainer Job Description	EV 17		
5ARTP	Contributing to Resourcing and Talent Planning	3.4	Email to Compensation to evaluate Associate Technical Trainer role	EV 18		
5ARTP	Contributing to Resourcing and Talent Planning	3.4	Salary Recommendation	EV 19		
5ARTP	Contributing to Resourcing and Talent Planning	3.4	Job Code	EV 20		
5ARTP	Contributing to Resourcing and Talent Planning	3.4	Personnel Announcement	EV 21		
5ARTP	Contributing to Resourcing and Talent Planning	3.6	Employee Handbook	EV 22		
5ARTP	Contributing to Resourcing and Talent Planning	3.6	Development Model	EV 23		

Candidate declaration:

- I confirm that the work/evidence presented for assessment is my own unaided work.
- I have read the assessment regulations and understand that if I am found to have 'copied' from published work without acknowledgement, or from other candidate's work, this may be regarded as plagiarism which is an offence against the assessment regulations and leads to failure in the relevant unit and formal disciplinary action.
- I agree to this work being subjected to scrutiny by textual analysis software if required.
- I understand that my work may be used for future academic/quality assurance purposes in accordance with the provisions of the Data Protection Act 1998.
- I understand that the work/evidence submitted for assessment may not be returned to me and that I have retained a copy for my records.
- I understand that until such time as the assessment grade has been ratified through internal and external quality assurance processes it is not final.

Signature:



Date:

04/12/2021

Valero's approach to talent planning

Workforce planning includes several resourcing activities that are concerned with ensuring organisations can attract, develop and retain talent. The Valero corporation has a dedicated Corporate Talent Management group based in San Antonio Headquarters (SAHQ), who are responsible for managing and reporting on workforce planning activities from each Refinery location. However, individual workforce planning activities, such as recruitment and selection, succession planning and performance management are managed locally for the Refinery groups - Operations, Maintenance, Technical Services, Health, Environment and Safety, and Planning and Economics. Workforce planning activities for the service groups – Human Resources, Business Services and Computer Information Services, are carried out in conjunction with SAHQ and are excluded from some of the local workforce planning activities, such as succession planning.

Valero's workforce planning is linked to organisational objectives, and the Refinery's 2021 Business Plan identifies 'structured talent management through the identification and development of employees' as a strategic objective. To ensure adequate resourcing, Valero rely on several workforce planning activities to attract, develop and retain employees. Workforce Planning activities, including the Resource Plan, Talent Matrix, and Succession Plan are carried out by the Pembroke Development Committee (PDC), and are reviewed and updated throughout the year. These workforce planning activities include Refinery employees but exclude the service groups, and hourly paid operations employees who are represented by the collective agreement. [\[EV 3\]](#)

The Refinery Resource Plan identifies the engineering population within the Technical organisation and the engineering and non-engineering population within the Health, Safety and Environment organisation. The plan identifies the current population and forecasts a 5-year plan, using 'attrition modelling' – expected retirement, resignations and transfers out, and 'staffing plan' – transfers in, associate hires and experienced hires to calculate future headcount. [\[EV 4\]](#)

The Pembroke Talent Matrix identifies the critical and general talent population to be evaluated. The critical talent population includes managers and engineers at senior level and above, while the general talent population includes associate and intermediate level engineers and the remaining employees not included in the critical talent population. Each population is evaluated against the talent criteria and assigned to a 'Talent Bucket', based on their overall performance and potential - Top 10%, Next 15%, Core 65%, Bottom 10%. The employees assigned to the bottom talent are then reviewed to identify any that would be a 'core' performer, if the distribution parameters didn't exist. Those true 'bottom' performers are then managed through a separate process to improve performance.

Individuals assigned to the 'top' talent bucket are classed as 'high potential' and are entered into Valero's 'Emerging Leaders Program'. [\[EV 5\]](#)

Valero operate in an intense global competitive market, which relies heavily on business continuity. Business continuity is a key objective in succession planning, and an efficient mechanism in place to "address potential vacancies, both planned and unplanned" to ensure minimal disruption to the business. (Valero, (2021)) The Refinery Succession Plan lists all the business-critical roles and identifies suitable successors, acknowledging whether they are 'ready now' or 'ready in 1-2 years'. For those who are not yet ready, areas for development are identified and discussed with individuals during performance management meetings. Pembroke Refinery's approach to succession planning is traditional – an approach described by the CIPD as "highly structured, confidential and top-down", (Weeks, (2020)) which is typical of large organisations like Valero. A meeting with the Operations Director confirmed that managerial judgement is used to identify potential successors. The process is confidential as individuals may be identified for more than one business-critical role in the early stages of their career development. [\[EV 6\]](#)

Due to the complexity of the operations structure, workforce planning is carried out independently from the rest of the Refinery groups. Operators are represented by a collective agreement between 'Pembroke Refinery' and 'Unite the Union', which clearly sets out the minimum competencies required for each complex area for safe and reliable operations. The Operations Manning Plan is managed by the area Complex Managers who are responsible for ensuring full competency across all positions. Complex Managers review the competencies within their Complex area and approve Priority 1 training where a future gap in competence is predicted as a result of an expected retirement. [\[EV 7\]](#)

The contractor workforce is represented by the National Agreement for the Engineering Construction Industry (NAECI), commonly referred to as the 'blue book'. The NAECI agreement serves to "increase the industry's ability to attract and retain able and motivated people". (National Joint Council for the Engineering Construction Industry, (2019)) by offering consistent terms and conditions of employment and paying nationally agreed hourly rates of pay. This ensures that local labour is not tempted by enhanced terms and pay on other 'blue book' sites in the UK. [\[EV 8\]](#)

Valero use Solomon data to benchmark the optimum staffing levels for superior performance. Solomon is the leading benchmarking firm in the refining industry that compiles high-quality data through its Fuels Study. The data allows Solomon to compare the competitiveness of refineries around the world, and the Valero Global corporation uses the data to inform the optimum headcount levels for safe, reliable and profitable operations. An analysis of the range of workforce planning techniques applied throughout the employment lifecycle, has identified that generally, workforce planning activities are

addressing the need for people and skills, with the exception of engineers. Competition is high, both locally and nationally for engineers, and Pembroke Refinery's struggles to attract engineers over the last few years, coupled with the increase in resignations has resulted in a steady decline in the number of engineers. Several offers made to students who went through the graduate recruitment programme were declined in favour of a career in renewables, rather than oil and gas. This adds additional pressure on the refinery, particularly since the Welsh Government announced its "legal commitment to achieve net zero emissions by 2050". (Welsh Government, (2021)) This target will require changes to legislation, which will put Pembroke Refinery under immense pressure to reduce carbon emissions and increase sustainability, and engineers are critical to achieving this target.

Evidence

Meeting with Richard Allen, Director Refinery Operations (Acting General Manager)

EV 1

Meeting with Richard Allen to understand how successors are identified

The Pembroke Development Committee (PDC) meet regularly to discuss succession planning.

Each Director has a similar approach in that they use managerial judgement to identify potential successors. They refer to the Pembroke Plant Development model, which clearly states the eligibility criteria for each level. For example, to be eligible to be considered for a 'manager' role, potential successors must have experience attained in 4 – 5 different job roles. Typically, employees would only experience the required number of roles if they had been enrolled in the 'Emerging Leaders' programme, that sees employees rotate through different areas of the business.

RA talked me through a typical career path for an Instrument Technician who has been identified as 'high-potential'.

Using an ex-apprentice as an example:-

Associate Technician/Instrument Technician - 5-7 years

Planning/Turnaround - 2-3 years

Instrument Engineer/Project Engineer - 3-4 years

Maintenance Supervisor / Operations Superintendent 2-3 years

(Depending on the career path they have expressed an interest in/the business sees them in).

This is a standard career path for an Instrument discipline technician.

Meeting with Joe Muehlbauer, Director Technical Services

EV 2

Meeting with Joe Muehlbauer to discuss the issues faced with recruiting Engineers

Over the last 6-7 years there has been a steady decline in the number of applicants for the Engineering Bursary Programme and the undergraduate Industrial Placement programme - historically, these programmes have satisfied our need for engineers.

Feedback from students on the year in industry programme indicates that the placement at Pembroke Refinery is excellent and their experience is engaging. However, most indicate that they do not want a career in the oil industry, but that they applied for a placement at the Refinery because it will "look good on their CV" when applying for a job after their studies - **interview questions to be reviewed to focus on the oil industry and the motivation for applying.**

The US refineries do not experience the same issues as we do with attracting engineers - quite the opposite in fact - it is highly competitive and they secure the best engineers. This is for a few reasons - the oil industry in the US is not viewed as negatively as it is in Europe, and more of Valero's refineries in the US promote their diamond green diesel, and ethanol plants, and wind farms, giving a much more 'sustainable' view of the Valero brand. Pembroke Refinery is a much more complex refinery with the capacity to produce

At the annual Technical Directors meeting, Joe discusses the issues recruiting engineers. Notes for the Tech Resource Plan re issues recruiting engineers:

DIRECTIONS:

STEP 1	In Table A, list the 2020 resource issues for your site.
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<i>Note:</i>	<i>Resource Issues from the last four years are included as a reference below.</i>
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Table A

Tech/HSE Resource Issues 2020

- Multiple retirements throughout operations team has pulled process engineers as superintendent backfills
 - Anticipate 20% turnover by 2022
- Refinery TAR planning and supervision team staffed by VLO personnel due to lack of contractor availability/experience
 - Pull on mechanical engineering resources
- Regulatory scrutiny on experience/competence of engineering staff
 - Utilizing ETEP and professional accreditation to demonstrate competency
 - Designating "lead engineers" to endorse work
- Issues backfilling leavers and retirees through graduate selection programme due to reduced applicants. Top achieving students are accepting placement opportunity but not accepting a graduate role
 - Anticipate further reductions in applicants due to 'greener' options taking priority
- Process Engineers still being rotated to London P&E role, despite struggles to backfill

BUSINESS PLAN 2021



Human Resources

C&O TAR 2021

- Zero Injuries
- Zero Environmental Incidents
- Complete the event on time
- Complete the event on budget
- First time, Leak free start up
- Achieve a safe, reliable and continuous run to the next major TAR

BASE BUSINESS

- Deliver Leadership training to all supervisors and above
- Extend participation in training to maintain standards and develop employees
- Continue partnership with Duradiamond to ensure seamless OH holistic service site wide
- LPS Stewardship
- Covid 19 response support

PEOPLE

- Targeted and selective recruitment and hiring efforts
- Delivery of robust technical and professional development programmes
- Structured talent management through identification and development of employees
- Review all Safety Critical roles and match safety critical tasks to roles - Include in handover documentation and roll out for all Tier 2 level roles
- Facilitate and support CPD hours for team members

SAFETY & COMPLIANCE

- Review and deliver against Fatigue Management standards
- Implement the revised Valero Technical Training Standard
- Ensure policies covering current and future legislation are understood, applied and adhered to

RELIABILITY

- Accurate and timely delivery of monthly payroll and associated reporting
- Review all training undertaken across site to ensure accurate capture and recording
- Maintain medical equipment to ensure best possible duty of care

TAR & PROJECTS

- Audit and process additional approved payments
- Ensure efficient and effective labour relations strategy
- Ensure all welfare activities are Covid 19 compliant
- Provide appropriate and timely medical services cover

PROFITABILITY

- Manage budget against allocation
- Continue to seek ways to realise cost efficiency opportunities
- Review and monitor agency headcount against business requirements and continue to review appropriate providers

DIRECTIONS:		*CONFIDENTIAL*
STEP 1	In Table A (1-4), populate the 2020-2024 staffing plan. Be sure to include Engineering Managers in staffing numbers. (Do not include Complex Managers, Maintenance Managers, or Turnaround Managers)	
STEP 2	In Table B (1-4), provide movement details to reflect attrition modelling & staffing plans made in Table A.	
STEP 3	Table C summarizes the Associate Hires in Table A (1-4). Use Table C to complete Table D (1-2). Be sure to indicate the specific Department and Hiring Manager for each position.	
STEP 4	Enter your intern/co-op hiring requests in Table E (include sophomore, junior, and senior intern/co-op request in totals, by year).	
STEP 5	Complete Table F by indicating the Discipline, Department, College Classification, and Term for each 2021 intern/co-op request in Table E.	

[illegible]

*March 2020 through end of year

[illegible]

Staffing Plan	Transfers/ Promotions In (+)								
	Associate Hires (+)								
End of Year	Experienced Hires (+)								
	Total Filled Positions (Incl. OVLs)	7	7	7	7	7			
	Total Over/Under Headcount	1	1	1	1	1			

*March 2020 through end of year

Staffing Summary Plan: Outlines total Engineering staffing strategy across Table A1-A4

		Tech Engineer Summary Table				
		2020*	2021	2022	2023	2024
Start of Year	Total Approved Positions (+)	43	43	43	43	43
	Total OVLs Filled (+)	1	1	1	1	1
	Total Open Positions (-)	-5	-5	-5	-5	-5
Attrition modelling	Expected Retirements (-)	0	0	0	0	0
	Resignations (-)	0	0	0	0	0
	Transfers/ Promotions Out (-)	0	0	0	0	0
Staffing Plan	Transfers/ Promotions In (+)	0	0	0	0	0
	Associate Hires (+)	0	0	0	0	0
	Experienced Hires (+)	0	0	0	0	0
End of Year	Total Filled Positions (Incl. OVLs)	39	39	39	39	39
	Total Over/Under Headcount	-4	-4	-4	-4	-4

Talent Matrix

EV 5

Talent Buckets	Employee Count	Employee Talent Distribution	Approx. Target # in Each Bucket
1= Top 10%	6	9.5%	6
2= Next 15%	9	14.3%	9
3= Core 65%	42	66.7%	41
4= Last 10%	6	9.5%	6

Total Employees	62
# of Employees Missing Evaluation	0

CONFIDENTIAL

[illegible]

Succession Plan

EV 6

Date:	01/10/2021		Department/Location			Pembroke Refinery	
	POSITION	CURRENT	SUCCESSOR	SUCCESSOR	READY NOW (x)	READY IN 1-2 YEARS (x)	COMMENTS / AREAS FOR DEVELOPMENT
	(TITLE)	(NAME)	(NAME)	(POSITION)			
RLT	Position	Name					
	Director Refinery Operations						
RLT	Position	Name					
	Director Central Maintenance						
RLT	Position	Name					
	Director Technical Services						
RLT	Position	Name					
	Director Environmental / Safety Affairs						
RLT	Position	Name					
	Director Refinery P&E						
	Position	Name					
	Manager Complex Refining						
	Position	Name					
	Manager Complex B&S						
	Position	Name					
	Manager Complex C&O						
Operations	Position	Name					
	Superintendent Operations (Utilities) *Dev Role						

Maintenance	Position	Name					
	Manager Central Shops						
Maintenance	Position	Name					
	Manager Fixed Equipment						
Maintenance	Position	Name					
	Manager Field Execution						
Maintenance	Position	Name					
	Manager Turnaround						
Maintenance	Position	Name					
	Manager Turnaround						
Maintenance	Position	Name					
	Superintendent Maintenance (ROTO)						
Maintenance	Position	Name					
	Superintendent Maintenance (I/E)						
Maintenance	Position	Name					
	Superintendent Maintenance (Refinery Svcs)						
Technical	Position	Name					
	Manager Reliability						
Technical	Position	Name					
	Manager IAEC Reliability						
Technical	Position	Name					
	Manager Process Engineering						

Technical	Position	Name					
	Manager Project Engineering						
Technical	Position	Name					
	Chief Inspection Engineer						
Technical	Position	Name					
	Manager Laboratory						
HES	Position	Name					
	Manager Refinery Process Safety						
HES	Position	Name					
	Manager Safety						
HES	Position	Name					
	Manager Environmental Engineering						

Collective Agreement between Pembroke Refinery and Unite the Union

EV 7

11. Operator Flexibility/Competency

All employees undertake to train as per agreed development plan for the next higher level and to fill positions as required when qualified to do so, unless personal circumstances at that time do not warrant it. Salary will be adjusted to the position being held.

It will be possible to be classified into a higher grade when all the requirements of the higher grade have also been met.

Employees will work in any position where they have passed competency requirements, including lower graded positions. Refresher training may be requested where an employee feels he/she has not actively worked in that position over a 6 month period.

Additional Minimum Competencies Required for Each Area to be accounted for when manning positions.

Cat Olefins

FCCU

- 1 Lead Operator
 - FCCU Control Operator
 - 2 Plant Operators
- Two Cat Cracking Panel Qualified persons on shift at all times.

Olefins

- 1 Lead Operator
 - 2 Control Operators (Alky/ULSG) (Butamer/Sulphur)
 - 4 Olefin Plant Operators
- Two Alky/ULSG Panel Qualified persons on shift at all times.

Flexibility is required to allow for the second Control Operators to be released to the panel as required.

Refining

Blacks & Utilities: Min 8 Positions

- 1 Lead Operator
- 3 Control Operators (CDU/CDU Merox) (VBU/VDU & Cooling Towers) (Steam Plant/Utilities)
- 3 Plant Operators (As Above)
- **1 Floater Operator**, who should be of CDU & Vac Plant Operator competency
- White Oils: Min 6 Positions
- 1 Lead Operator
- 2 Control Operators (Unifiner/HTU1 & HTU2) & (CRU/CCR/LPGU/ISOM/HRU)
- 3 Plant Operators (Unifiner/HTU1) (HTU2/ISOM/HRU) (CCR/CRU/LPGU)

Utilities

Two competent Steam Plant Operators to be on shift at all times. There must be provision to release that person e.g. If 2nd steam plant person is manning a Control position, there must be another Control Operator available to release the individual as required.

Blending & Shipping.

In order to increase flexibility on shift and to allow Control Operators to maintain outside competency the following is the minimum allowable shift competence:-

a) Inshore, with one of the two Control Operators being:

- Lead Operator
- Control Operator Chair
- Control Operator Panel
- West Fieldsman
- East Fieldsman
- Day Plant Operator (phase 3 permit competency)
- Blending & Shipping Operations Technicians.

b) Jetty:

- Jetty Lead/Operator
- Berth Cover subject to shipping
- Two people per shift will be allowed off and this should normally be booked as per agreement

Any leave requirements may be covered with the following support:-

- Optimizing shipping to release a berth operator to come inshore.
- Use of berth watchmen to release a berth operator to come inshore.

TFT, WWTP, RTW & Jetty Technician

- Technicians to train across all berths, Waste Water Treatment Plant, RTW and Tank Farm with a minimum £250 increment for each position trained and passed as competent, this payment will increase through annual merit increases.
- Business needs will dictate who is selected to be trained to a higher grade. (Best Candidate)

Across all areas, the Development position on the manning board will provide flexibility to the shift team leader for training and personal development. This position is above the minimum required level and competencies.

Part 1: Core Terms and Conditions

1. The NAECI

1.1 KEY OBJECTIVE

The 2019 – 2020 NAECI Agreement was concluded between the trades unions and employer representatives on 16 November 2018. It retains and builds upon the achievements of NAECI 1981–2018.

The key objective of the NAECI is to continue to supply a modern, robust and 'fit-for-purpose' national employment relations structure that:

- (a) Enables United Kingdom engineering construction industry employers and clients to remain globally competitive;
- (b) Provides attractive terms and conditions and greater security of employment for a competent, motivated, productive and competitive industry workforce; and
- (c) Establishes a sound foundation for further improvements to industry productivity, resourcing and employment relations, assuring global clients of the benefits of continuing to invest in United Kingdom projects and sites.

1.2 PARTIES

The signatories to the NAECI are:

- (a) For the trades unions:
 - Unite the Union – www.unitetheunion.org
 - GMB – www.gmb.org.uk
- (b) For the employers:
 - ECIA (Engineering Construction Industry Association) – www.ecia.co.uk
 - TICA (Thermal Insulation Contractors' Association) – www.tica-acad.co.uk
 - SELECT (Electrical Contractors' Association, Scotland) – www.select.org.uk

1.3 NAECI REGISTRATION

Registration of work is a requirement for employers to use the NAECI. All in-scope engineering construction activities as defined in NAECI 1.4 are eligible for Registration.

The Registration process formalises and strengthens the use of NAECI, thus ensuring its benefits are delivered in full for our Clients as well as for employers and employees of signatory employers' associations and trades unions.

References

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Ways to improve Valero's approach to talent planning

Valero offer an **Engineering Bursary** programme and an undergraduate **Industrial Placement** programme, both designed to attract high achieving engineers. The Engineering Bursary programme is available to Pembrokeshire students who intend studying Chemical or Mechanical Engineering with a year in industry at university. Valero pay £1,000 per term, plus summer placements, and a year in industry to allow candidates the opportunity for onsite experience. Securing an Engineering Bursary used to be highly competitive, but despite advertising the scheme with Pembrokeshire schools, the local newspaper and on social media, applications for the Bursary programme has declined considerably over recent years. **[EV 9] [EV 10]**

The Industrial Placement programme is available to all UK students in their third year of studying a Chemical or Mechanical Engineering degree programme. Like the Bursary programme, applications are declining year on year, from receiving 120 applications in 2017 to just 42 applications in 2021, despite the number of students studying engineering remaining high.

Recruitment of engineers - both graduate and experienced - has become very challenging. Since 2019, 6 graduate offers were made, of which 2 were declined, and 1 resigned after just 17 months in post, meaning only 50% take up of jobs. The Financial Times explains that despite high salaries, graduates no longer want careers in oil and gas for ethical reasons, with a survey from Amnesty International in 2019 reporting climate change as "the single biggest worry for 18- to 25-year-olds". (Kuper, (2021))

Part of Valero's compensation award is long-term incentive pay. This benefit is typically reserved for rewarding employees for a high level of performance and contributions to the company, with the intention of It is designed to increase ownership in the company for employees who have made the greatest impact on its future. It is an equity-based, long-term incentive pay that is awarded annually by senior management. There has been some discussion about extending this benefit to engineers, although feedback from those who have left the company, and those students who declined a graduate offer, state the compensation package is very generous and does not form part of their decision to leave or decline an offer. In light of this, the employer branding needs to focus on an environmentally sustainable message. Valero's guiding principles, stress the need for 'reliable, affordable and sustainable energy', and Valero's environmental, social and governance objectives would be a more appealing and more positive message to convey, such as the ongoing investments in renewable fuels and their commitment to diversity, equality and inclusion. **[EV 11]**

Historically, reliance on these programmes to fill positions has been very successful, with most business-critical roles filled with ex-apprentices or ex-students. For example, the

current Operations Director went through the apprenticeship programme, and has held several roles during his 30 years' service which has equipped him with the skills required for a director level role. The apprenticeship programme continues to be very successful, according to the 2022 HR Business Plan, there will be a review of the apprenticeship programme to ensure it continue to meet business needs. [\[EV 12\]](#)

Pembroke Refinery's apprenticeship programme was established in 1977 and the ongoing commitment to supporting high quality apprenticeships is at the forefront of talent planning. The apprenticeship programme offers two apprenticeship routes – operations and maintenance, and within the framework for the maintenance apprenticeship, offer trade routes in mechanical maintenance, electrical maintenance, and instrumentation. The annual recruitment target is based on attrition forecasting, and for the last 3 years, the recruitment target has been 20 apprentices per year. [\[EV 13\]](#)

An ongoing shortage of skilled workers in the engineering sector makes it difficult to determine if the demand for skilled workers would be met without the apprenticeship programme. The apprenticeship programme has been customised to address specific skills gaps, and the length of the programme ensures sufficient time for apprentices to gain the required skill levels, plant knowledge, operating procedures, and maintenance standards in readiness for post apprenticeship employment.

An analysis of the number of ex-apprentices that remain in employment at Pembroke Refinery would identify potential benefits to the organisation in terms of retention. While this would be difficult to quantify financially, research suggests that "the cost of replacing a highly trained employee can exceed 200% of their annual salary", (Howells, (2020)) when compared to the costs associated with employee turnover.

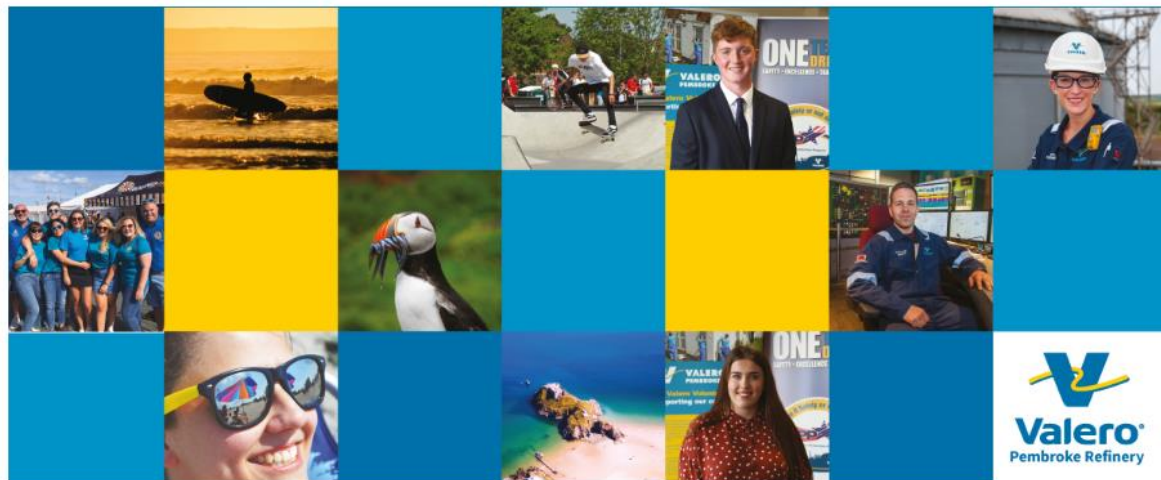
Pembroke Refinery's apprenticeship programme is hugely successful, with a high proportion of the current maintenance and operations workforce having come through the apprenticeship programme, and many of them now in supervisory or managerial roles.

The apprenticeship programme is recognised for being a high-quality programme and it continues to attract a huge number of applicants per year, although post apprenticeship retention over the last year has declined slightly. The apprentices are well equipped with the skills and knowledge that make them very desirable to competitors. In 2021 three apprentices resigned before the end of their programme and all of them stated that they were worried that there was no future in oil and gas industry.



[About Valero](#) [Vacancies](#) [Work Experience](#) [Engineering Bursary Scheme](#) [Industrial Placements](#) [Apprenticeships](#)

ENGINEERING BURSARY SCHEME



To meet the growing demand for engineers we are providing scholarships to Pembrokeshire students intending to study Chemical Engineering or Mechanical Engineering at a UK University.

The Bursary Scheme benefits include:

- £3,000 per academic year
- Paid employment during summer holidays and 'Year in Industry' placement
- Mentoring contact at Valero

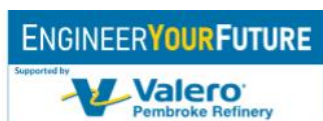
Students will be assigned to a Business Unit and will be expected to work at the Refinery during their industrial placement year.

After graduation, students will be entered into the graduate recruitment selection process.

Recruitment is now open for those starting university in September 2021. If you're studying chemical or mechanical engineering from September 2021, please send a detailed CV and your UCAS Personal Statement to pembrokehr@valero.com

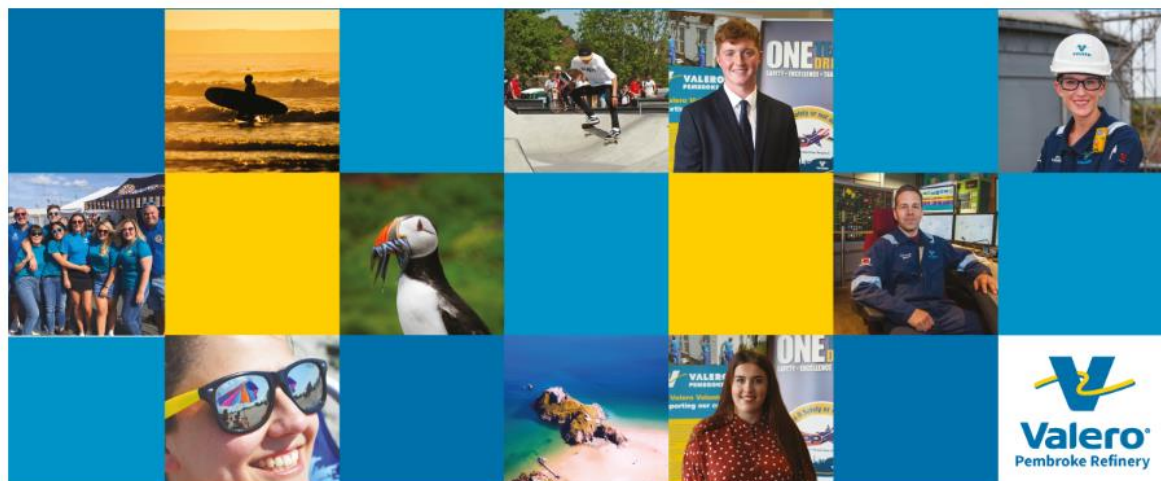
Undergraduate Industrial Placement Programme

EV 10



[About Valero](#) [Vacancies](#) [Work Experience](#) [Engineering Bursary Scheme](#) [Industrial Placements](#) [Apprenticeships](#)

INDUSTRIAL PLACEMENTS



YEAR-LONG PAID INDUSTRIAL PLACEMENTS AT PEMBROKE REFINERY

APPLICATIONS FOR 2022 - 2023 NOW OPEN

An industrial placement at Valero provides mechanical and chemical engineering students with the opportunity to put their academic skills into practice in a dynamic and challenging environment.

You won't just be stuck behind a desk here - you will be working with experienced engineers to solve real technical problems, contributing to a team, and gaining valuable experience.

You will have to prepare and deliver professional presentations, and put your theoretical knowledge to the test. You will also have the chance to see what it is like to work for a big company, take part in education events and inspire the next generation, and immerse yourself in Valero culture via our volunteer programme.

To support this, you will benefit from targeted and specific training, be placed with a dedicated mentor, and will get to see how different sections of the business work together towards a common goal.

Want to stand out when you finish university? Like the sound of earning as you learn?

Our year-long industrial placements offer:

- Full-time employment from June 2022 - July 2023
- Nine-day fortnight working pattern (every second Friday off)
- 28 days' paid holiday
- Dedicated mentor
- A chance to actively contribute to a working refinery
- Potential for future employment once you graduate

Note, we typically ask that Chemical Engineering placement students have completed 3 years at university prior to placement start.

MECHANICAL ENGINEERING

As a mechanical placement student you will:

- Work with experienced engineers and contribute to a team
- Evaluate the integrity of in-service pressure systems and repair designs
- Identify corrosion mechanisms and optimise material selection
- Use finite element analysis (FEA) software and other modelling programmes
- Develop professional report writing and presenting skills
- Gain one year's credit towards IMechE Monitored Professional Development Scheme (MPDS)

CHEMICAL ENGINEERING

As a process placement student you will:

- Work as part of a team with experienced engineers and operators
- Investigate and solve problems on a working refinery
- Build relationships with other departments, contractors and external companies
- Actively participate in unit shutdowns and vessel entries for inspection
- Use industry software to map data and produce in-depth reports
- Gain valuable experience for IChemE Chartership

Valero Guiding Principles

EV 11



Guiding Principles

Our Vision

The world needs reliable, affordable and sustainable energy. We are advancing the future of energy through innovation, ingenuity and unmatched execution.

Our Guiding Principles

We believe our guiding principles exemplify what differentiates our company today. We relentlessly pursue excellence; embrace the highest standards of safety and responsible operations; we care about the environment, our employees and the communities where we work and live; and we hold ourselves to the highest standards of integrity, with strong governance and ethical standards.



Safety

Safety is our foundation for success.



Environment

We are committed stewards of the environment.



Communities

We will be a good neighbor by sharing our success with the communities where we live and work through volunteerism, charitable giving and the economic support of being a good employer.



Employees

We consider our employees a competitive advantage and our greatest asset. We foster a culture that supports diversity and inclusion, and provide a safe, healthy and rewarding work environment with opportunities for growth.

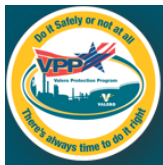


Governance

We view our stakeholders as partners to whom we seek to deliver operational excellence, disciplined management of capital and long-term value on a foundation of strong governance and ethical standards.

2022 HR Business Plan

EV 12



HR 2022 Business Plan Draft

ONE TEAM DREAM
Safety • Excellence • Teamwork

Base Business

- Work Safe Home Safe so nobody gets hurt and no Covid-19 transmissions
- No process safety, environmental or reliability events
- Maintain VPP star status
- Steward LPS with excellence
- Meet our budget and ensure accurate forecasting
- No overdue compliance actions (LPS, IANs, PMs, EMOC, EHSM, HSE, PRMS)
- Meet Refinery Operating Plan every shift
- Make our workplace a more welcoming place for everyone

People

- Improve diversity in recruitment & selection, providing equal opportunities to all
- Adopt Valero Performance Management Process (replaces EPR)
- Create and deliver a Refinery Development and Training Plan that includes Leadership training, structured talent management, and technical and professional development
- Develop minimum standard requirements and objectives for all training that is delivered, or criteria for attendance to offsite classes
- Development of maintenance competency pathways (including safety critical tasks/roles) for job roles based on plan
- Encourage, facilitate, support and track Continuing Professional Development (CPD)
- Review Apprentice Program to ensure it continues to meet business needs

Safety and Compliance

- Evaluate and improve contractor competency demonstration and auditing
- Ensure policies covering current and future legislation are understood, applied and adhered to
- Review company's third party occupational health service requirements
- Review early injury and short term absence management processes

Reliability

- Accurate and timely delivery of monthly payroll and associated reporting
- Maintain medical equipment to ensure best possible duty of care

Profitability

- Manage budget against allocation
- Continue to seek ways to realise cost efficiency opportunities
- Review and monitor agency headcount against business requirements and continue to review appropriate contractors/providers



Apprenticeship Programme

EV 13



[About Valero](#) [Vacancies](#) [Work Experience](#) [Engineering Bursary Scheme](#) [Industrial Placements](#) [Apprenticeships](#)



- ✓ Do you have or are you currently studying for Five GCSEs at grade C or above, to include Mathematics, Numeracy (both from intermediate/higher tier), Science and English Language or First Language Welsh?
- ✓ Do you have an interest in Process Operations, Engineering, Mechanical, Instrument or Electrical Maintenance – maybe in your current studies or hobbies and clubs?
- ✓ Do you have the energy and enthusiasm that we love to see in all of our people?
- ✓ Do you have the curiosity, thirst for knowledge, and desire to drive your own development?

APPLICATIONS FOR 2022 OPENING SOON. REGISTER YOUR INTEREST FOR FUTURE OPPORTUNITIES BY CLICKING HERE

Yes to all of the above? – read on!

We have been passionate about our apprenticeships at Pembroke Refinery since 1977! For over 44 years, we have continually strived to build and improve our apprentice experience and here is your opportunity to be part of the class of 2021.

What does the commitment look like for you?

An apprenticeship at Valero Pembroke will require you to achieve academic (BTEC) and vocational (NVQ) qualifications at or above level 3 over four years.

Starting in September 2021 with that thirst for new knowledge, your first year will be full time at Pembrokeshire College. You will be taught a broad range of engineering topics relevant to the refinery, this includes practical and academic performance criteria.

During the second and third year this academic learning continues on a day-release basis. The remainder of your time will be learning here on site. We expect you to specialise in a discipline as you experience continual on the job learning. Our specialist areas are spread across the refinery and include mechanical, operations, electrical, inspection, and electrical/mechanical drawing office opportunities.

You will be an individual who is keen to learn and get on – demonstrating a drive to develop. So you can expect to be continuously assessed throughout your apprenticeship programme via observations, assignments, on the job reports, performance observations, examinations and further training at the refinery.

To learn more about our business visit the Valero website

www.valero.com



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[Accessed 01 October 2021].

Contribute to resourcing people activities

Valero is a top tier Control of Major Accident Hazards (COMAH) registered site, regulated by the Health and Safety Executive (HSE) who are the Competent Authority. One of the control measures to address accident scenarios is to ensure that “arrangements are in place to ensure all employees have the necessary skills and competencies to do their job and deal with any emergencies that arise”. (HSE, (2015)) A recent audit by the HSE, identified that while there is a robust competence assurance process in place for Process Operations, there was no clear process for the maintenance, technical and safety groups. To address this, the Learning and Development (L&D) team have incorporated the ‘development of maintenance competency pathways (including safety critical tasks/roles) for job roles based on plan’, as an objective in the 2022 HR Business Plan.

The Senior Technical Trainer within the L&D team has elected to retire on 31st of December 2021, which gave the businesses an opportunity to review the structure of the L&D team. Valero is headcount driven, and as opportunities arise as a result of an employee leaving, it is important to consider the structure of the team, and individual roles and responsibilities. An ‘approval to restaff’ PCR must be submitted for approval by San Antonio Headquarters before any resourcing activity can take place – this includes hiring internally or externally, promotion or lateral move. Due consideration must be given to whether the role is still needed, whether the tasks can be absorbed within the existing team or whether it is a critical role that needs to be filled. If the role needs to be filled, it is good practice to consider the advantages and disadvantages of different recruitment and selection methods when deciding on the most appropriate method. [\[EV 14\]](#)

The e-PCR was approved, and then a meeting was held to review the current structure and consider different options to fill the position. The L&D Manager undertook a job analysis, which involved “collecting information from a range of sources”, (Taylor & Woodhams, (2016)) including key stakeholders, such as the maintenance managers, Pembrokeshire College and the apprentices. The information collected, combined with feedback from the HSE, and direction from the Refinery Leadership Team, was used to inform the decision to promote from within the team, creating a new Associate Technical Trainer role. This move is classed as a ‘career path’ promotion, and the candidate has been identified as ‘high-potential’ since joining Valero as a graduate in 2018. The L&D Manager has developed an on-going programme of continuous professional development (CPD) to progress areas of development relevant to the role, such as safety behaviours, self-awareness, coaching, communication, research, innovation, and industry trends. [\[EV 15\]](#) [\[EV 16\]](#)

A new job description was composed, ensuring that “the tasks that make up a job together with statements of reporting lines, areas of responsibility and performance criteria”, were

clear. The job description was reviewed by the HR Manager to ensure it was objective, fair and not potentially discriminatory. [\[EV 17\]](#)

The HR Manager secured endorsement from the Pembroke Development Committee (PDC), who are responsible for approving all resourcing decisions. The Compensation team evaluated the candidate and the job description, and provided a salary recommendation, and the new job was built in 'pay factors' ready for the electronic Personnel Change Request (e-PCR) to be submitted, with effect from 1st January 2022, allowing sufficient time for a full handover. [\[EV 18\]](#) [\[EV 19\]](#) [\[EV 20\]](#)

The L&D Manager met with each of the team individually to explain the new structure, and discuss the priorities for the team for 2022. Finally, once the team were informed of the changes, a personnel announcement was placed on Pembroke Intranet informing the workforce of the upcoming. [\[EV 21\]](#)

Although there is not a written down L&D policy, Valero are committed to providing it employees CPD and a mechanism for maintaining skills and knowledge can boost confidence, strengthen professional credibility, and prepare employees for new challenges and responsibilities. (CIPD, n.d.) Maintaining a dedicated L&D team will provide employees assurance that Pembroke Refinery is committed to competence assurance, and will strive to ensure the highest standards of workforce. Valero's commitment to training and development and educational assistance is outlined in the Employee Handbook. [\[EV 22\]](#)

As part of the changes, the Pembroke Development Model has been updated to include the Associate Technical Trainer role, showing a clear progression route to the Technical Trainer and Senior Technical Trainer roles. [\[EV 23\]](#)

Evidence

Approval to Restaff/Post e-PCR

EV 14



Prepared By: Gough, Melanie

Name Restaff/Posting Request	Empl ID	Position Sr Technical Trainer	Date Prepared 21 Sep 2021	Effective Date 21 Sep 2021
---------------------------------	---------	----------------------------------	------------------------------	-------------------------------

PERSONNEL DATA CHANGES				
ACTION / REASON Approval to Restaff/Post--> Approval to Restaff/Post			RELOCATION REQUIRED? No	

Employee Pay Change			Employee Termination	
Hourly Rate	Current	Proposed	Difference	Last Day Worked
Annual Rate				Eligible for Rehire
Reason				Final Time Card Received
				Annual Leave/Holiday
				Terminate Network Access

PERSONNEL DATA CHANGES				
Payroll Area	U1	No Change	Work Schedule	PE01
Work Location	Pembroke Refinery		Home Address Change:	
Mail Station	TRAINING DEPT			
Work Phone	+44646649336		Network User ID	

ORG DATA CHANGES				
Position Data	CURRENT POSITION		NEW POSITION	
	Current Data	Proposed Changes	Current Data	Proposed Changes
Position No	20038869			
Position Title	Sr Technical Trainer			
Position Short Title	GB.SrTrainer			
SAP Company	0811			
Cost Center Override				
Is Chief	N			
Shared Services	Central Services			
Employee Group	Regular Full Time			
Employee Subgroup	Salary Non Exempt			
Job Data	Current		Proposed	
Job ID	30005621			
Job Name	Sr Technical Trainer			
Job Short Name	GB.SrTrainer			
Manager Level	Non-Management (Exempt)			
Upgrade Eligible	N			
Shift Diff Eligible	N			
Pay Scale Area	UK			
Grade	F			
Org Unit Data	Current		Proposed	
Org Unit ID	10003251			
Org Unit Name	Training & Development			
Default Cost Center	PM337507			
Org Unit Chief	Bryant,Tracey L			
Chief Position Id	20038038			

Enterprise Structure	Current		Proposed	
Personnel Area	RVX9			
Personnel Subarea	LCL3			
Filenet Code				
Contract(Union)				

MANAGEMENT APPROVERS	
Bryant, Tracey L Manager Learning & Development We would like to fill this position due to retirement of current post holder Restaff/Post Immediately 23 Sep 2021 07:05 Farrell, Stacie G VP HR Operations Restaff/Post Immediately 24 Sep 2021 08:33	
Medler, David John Manager Compensation & Benefits Restaff/Post Immediately 27 Sep 2021 04:12	

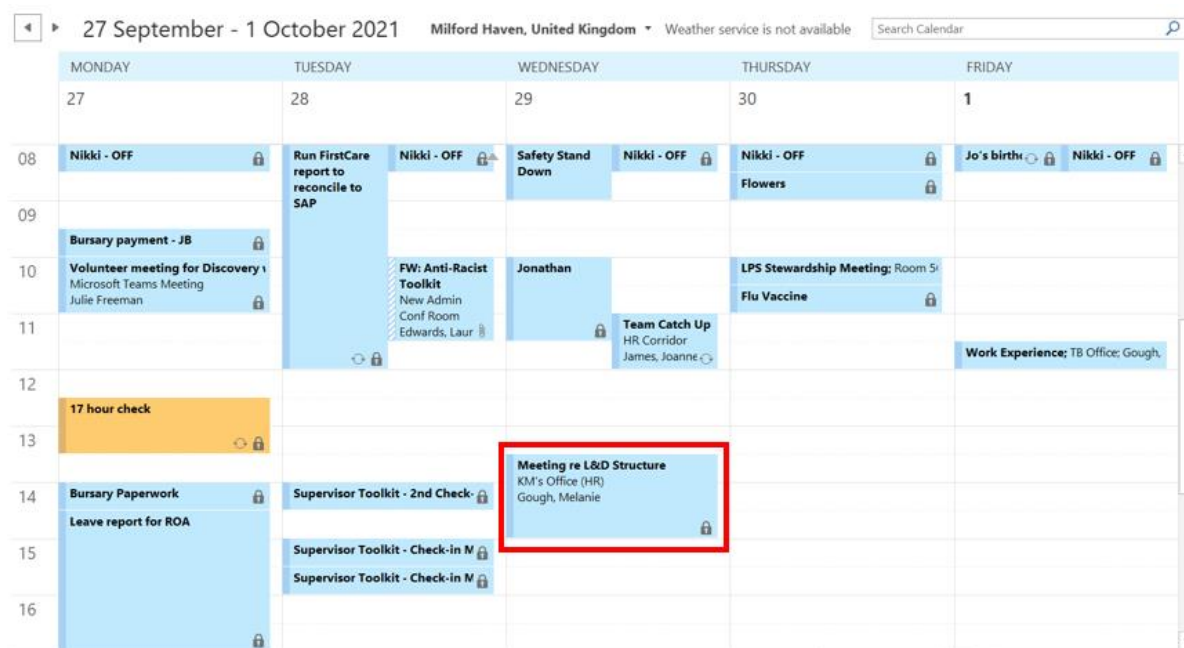
COMPENSATION APPROVERS	
Titus, Elizabeth DeGrassi Compensation Approve 27 Sep 2021 07:23	

COMMENTS	
[REDACTED] has tendered his notice to take voluntary early retirement effective 31.12.21. Approval request to fill this position when the incumbent retires.	

HRAS Review	HRAS Input	HRAS Verification	UK HR Notification
27 Sep 2021 Chavarria, Becky Jean			

Email to Tracey Bryant, Manager L&D re Structure of L&D Team

EV 15



From: Bryant, Tracey
Sent: 30 September 2021 10:30
To: Gough, Melanie <Melanie.Gough@valero.com>
Subject: RE: L&D Structure Review
Sensitivity: Confidential

Hiya,
Thanks for your help with this
I have updated as per comments from yesterday's meeting. Let me know if there's anything else you need for me.
Thanks Mel!

Trace

From: Gough, Melanie
Sent: 21 September 2021 16:49
To: Bryant, Tracey <Tracey.Bryant@valero.com>
Subject: RE: L&D Structure Review
Sensitivity: Confidential

Of course, I will put a meeting – it will be next week as Karen is booked up this week!

From: Bryant, Tracey
Sent: 22 September 2021 10:09
To: Gough, Melanie <Melanie.Gough@valero.com>
Subject: RE: L&D Structure Review
Sensitivity: Confidential

Hi Mel
I have some ideas to run past you and Jo/Karen – can we meet to discuss?

Trace

From: Gough, Melanie
Sent: 21 September 2021 16:49
To: Bryant, Tracey <Tracey.Bryant@valero.com>
Subject: L&D Structure Review
Sensitivity: Confidential

Hi Tracey

██████ has submitted his notice of intention to retire, effective 31.12.21. I have submitted a PCR to request approval to replace Hugh.

In the meantime, we need to review the L&D structure to ensure it is aligned to your department future needs and the HR Business Plan - do you plan to hire externally?

Please find attached the JD's we have on file for the following roles:

Training Administrator B
Technical Trainer E
Sr Technical Trainer F

I will put a calendar appointment in for us for next week to review and update the job descriptions and create the job advert.

Many thanks,

Mel



Senior Technical
Trainer.docx



Technical
Trainer.docx



Training
Administrator.docx

Meeting with Tracey Bryant, Manager L&D and Karen Muehlbauer Director Refinery HR (Acting)

29 September 2021, 13:30

EV 16

Notes from meeting: Learning & Development structure re competence assurance

Karen Muehlbauer (KM) – Director Health, Safety and Environment (Acting Director Refinery HR)

Tracey Bryant (TB) – Manager Learning & Development

Mel Gough (MG) – HR Business Partner

The HSE identified gaps in competence assurance for maintenance, technical and safety groups during a recent audit. RLT have requested that measures are put in place to address the gaps as recommended by the HSE.

TB outlined the upcoming changes to the team for consideration:

- Sr Technical Trainer (HNR) has given notice of his retirement effective 31/12/21.
- Superintendent Training (DR) has expressed his intention to retire at the end of 2Q2021.

TB talked through several options to replace HNR:

External hire

Advertise internally

Promote from within

After consideration, it was proposed that [REDACTED] (MB) currently employed as a Sr Technical Trainer would be promoted to Associate Technical Trainer, replacing HNR. MB was initially recruited through Valero's Business Graduate programme in 2019 after completing his Business degree at Swansea University. As part of his placement, he rotated through the service groups – HR, Business Services and CIS. At the end of his placement, he was identified as high-potential and hired as a Sr Training Administrator, with a view to develop him further.

MG explained the process for a managed move to TB & KM:

- TB to secure approval from the US to proceed with the recommendation in principle
- JJ to secure endorsement from Pembroke Development Committee (PDC)
- MG & TB to review the current JD's and develop new JD's
- JJ to approve JD's
- MG to send Associate Technical Trainer JD to compensation for evaluation
- MG to request for the job to be built in 'pay factors'
- TB to advise of new salary (within range recommended by compensation)
- MG to submit promotion e-PCR
- MG to confirm to TB when the e-PCR has been approved
- MG to write contractual change letter

Once approval is in place:

- TB to meet with Sr Training Administrator (MB) to inform him of the promotion
- TB to meet with DR
- TB to meet with HNR
- TB to inform the apprentices of the upcoming changes
- MG To post announcement on Pembroke Intranet

Assuming approvals are in place, start date agreed as 1st January 2022.

Future Actions:

Superintendent Training (DR) is a long-standing employee, with over 30 years' experience at Pembroke refinery. He joined the Refinery as an Operations apprentice and worked his way up to Shift Team Leader, before moving to the L&D team as a subject matter expert (SME). DR has confirmed his intention to retire end of 2Q2022.

In 1Q2022, commence we need to start considering the plans to backfill this role, to ensure smooth transition.

- JJ to confirm with Director Operations (ROA) the plan for this role – e.g., managed move or open posting process.
- MG & TB to review and update the current JD in readiness for recruitment and selection 1Q2022.

Promoting MB to Associate Technical Trainer will create an open position for an admin role.

- MG & TB to review and update the current JD in readiness for recruitment and selection 1Q2022.

Associate Technical Trainer Job Description

EV 17



Job Description

Organizational Information	
Position Title	Associate Technical Trainer
Work Location	Pembroke Refinery
Department	Training & Development

☒ New Job

☐ Rewrite Job Replaced _____

Reporting Functions	
Reports to Position Title	Manager Learning & Development
Reports one of	3
Supervisor Functions	Yes

Functions	Job Responsibilities (Key accountabilities within role to include system usage, budget/LOA, turnover, sales/volume/performance/safety targets, geographical area covered, statutory responsibilities, compliance responsibilities, key time deadlines) in concise clear terms
-----------	---

No.	% Time Allocated to Function	Key Job Responsibilities/Duties
1.	30%	Develop Competency paths for all refinery roles and work with the L&D Manager to maintain a model that ensures compliance with our regulator and a defined route to achieve competency, confidence and excellence for individual development both in current and aspirational roles. Work with the L&D Manager to prepare for audits and respond in a positive and timely manner to audit recommendations and actions.

2.	20%	Procure, arrange and schedule training from both internal and external providers. Aim to provide relevant, Valero-centric training which meets business and individual needs providing longevity of subject matter within the refinery.
3.	30%	Develop and maintain the Refinery's training calendar. Work with the admin support role to ensure completion of data entry and updates to electronic files and training records. Track and monitor spend against budget, collate and prepare detailed reports, training documentation and related information including pre and post learning evaluation.
4.	20%	Schedule, organise and drive improvements of the apprenticeship programme working closely with the FE provider reviewing, monitoring and responding to the needs of the programme. Day to day Coordination / Line Management of the Apprentice programme, putting the apprentice at the centre at all times. Working proactively with refinery business contributors and stakeholders in HR, Safety, Maintenance and Operations. Deliver workshops that focus on the holistic development of the individual in areas such as communication, self-awareness, reflective practice, and behaviours to ensure that both personal growth and technical ability feature within the apprenticeship programme.
<u>Number of Employees Supervised:</u>		
Exempt or Equivalent:	0	
Non- Exempt or Equivalent (hourly paid/overtime eligible:	0	
Contractors:	30	

Educational Level and Professional Qualifications Required/Preferred:

Degree qualified (Preferred)

Demonstrated interest / academic achievement and current and on-going CPD in areas such as Safety behaviours, Self-awareness, Coaching, Communication, Research, Innovation, and Industry trends

Experience (including number of years in role) Required/Preferred:

Two years' experience of working within an industrial setting preferred.

Email to Compensation to evaluate Associate Technical Trainer role

EV 18

From: Medler, Dave
Sent: 25 October 2021 12:20
To: Gough, Melanie <Melanie.Gough@valero.com>; Bryant, Tracey <Tracey.Bryant@valero.com>
Subject: Associate Technical Trainer

Tracey,

Please find attached a salary recommendation for [REDACTED], promoting him to the role of Associate Technical Trainer.

Please let Mel know your preferred salary and she will arrange for the necessary approvals.

Regards

David Medler
Manager Compensation & Benefits

Human Resources Department
Valero Energy Ltd
27th Floor, 1 Canada Square
Canary Wharf
London. E14 5AA
Tel +44 20 7513 3410
David.Medler@Valero.com



Associate Technical
Trainer - Marcus Blair

Registered office 5th Floor, 100 Wood Street, London EC2V 7EX. Place of
Registration: England and Wales. Company No. 8566216

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From: Gough, Melanie
Sent: 20 October 2021 11:32
To: Medler, Dave <Dave.Medler@valero.com>
Subject: Associate Technical Trainer

Hi Dave

Please find attached a JD for an Associate Technical Trainer role, eff 01.01.2022.

Please could you review the JD and provide a salary recommendation for [REDACTED], to Tracey Bryant cc me for the PCR.

Please could you then set up a new job code too?

Many thanks,

Mel



REVIEWED Associate
Technical Trainer Octo

Salary Recommendation

EV 19



Interoffice Memorandum

Date: 25 October 2021

To: Tracey Bryant

From: Dave Medler

Subject: Promotional Salary Recommendation – Marcus Blair

You have advised that [REDACTED] is being considered for promotion to the Associate Technical Trainer position within your organization. He is currently working as a Sr Training Administrator within the Refinery Training Team and earns £[REDACTED] pa.

External Data:

- Current Market reference: £[REDACTED]*

The criteria for an Associate Technical Trainer require a minimum of two years Industrial Training experience, and requires that the incumbent develop Competency Paths and define and develop a Competency Model, Schedule Training from Internal and External providers, develop and maintain the Refinery Training Calendar and schedule, organize and drive improvements to the apprenticeship program.

[REDACTED] has been onsite with the Valero for just over two years, joining us after attaining a degree in Business Management. He has developed well during this time and is on a clear path to becoming a technical trainer, having already completed several training programs as part of his CPD and impressing all those in the Training & HR Groups. Therefore, compensation supports the following;

Salary Recommendation:

At Manager's discretion up to £[REDACTED]

Benefit Band - [REDACTED]

This represents up to 80% of the Market Midpoint

Bonus Target will be 11%

If circumstances exist that would support a salary offer outside of this recommended range, please obtain and forward Division Head approval for your written justification of the proposed offer to me, or if you would like to discuss this further, please contact me at 020 7513 3410.

* The *Market Reference* is the average pay for jobs directly comparable in salary surveys to specific Valero jobs and is considered the *competitive value* of a job. The external market average is the starting reference around which pay is managed. Pay can be below, at, or above the external market average depending on an employee's qualifications, experience and job performance - all factors which determine what pay should be in relation to the market reference point for the job. External market averages should not be viewed as a rate of pay.

New Job Code

EV 20

From: Titus, Liz
Sent: 25 October 2021 14:29
To: Medler, Dave <Dave.Medler@valero.com>
Cc: Gough, Melanie <Melanie.Gough@valero.com>
Subject: RE: Associate Technical Trainer

Hi Dave,

I have created the job in SAP and the new job code is 30537391. Please let me know if you need anything else.

Thank you,

Liz Titus, PHR, SHRM-CP
Lead Compensation Specialist
Valero Energy Corporation
1 Valero Way | San Antonio, TX 78249
Office: (210) 345-5031 | Cell: (254) 624-7522

From: Medler, Dave
Sent: 25 October 2021 12:21
To: Titus, Liz <Liz.Titus@valero.com>
Cc: Gough, Melanie <Melanie.Gough@valero.com>
Subject: Associate Technical Trainer

Liz,

I have set up a new role in drafts, Associate Technical Trainer. Can you please cut this role live, Benefit Band D, Non Exempt, No Shift, No Call out and let Mel and I have the Job code.

Many thanks in advance.

Regards

David Medler
Manager Compensation & Benefits

Human Resources Department
Valero Energy Ltd
27th Floor, 1 Canada Square
Canary Wharf
London. E14 5AA
Tel +44 20 7513 3410
David.Medler@Valero.com

Registered office 5th Floor, 100 Wood Street, London EC2V 7EX. Place of
Registration: England and Wales. Company No. 8566216

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EV 21



Refinery Operations - Corporate

News

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	Job Posting – John Crane Condition Monitoring Technician	... October 19
	Job Posting – Senior Laboratory Technician	... October 14
	Job Posting – Environmental Engineering Manager	... October 8
	Flu Vaccine	... September 21
	Job Posting – Shift Team Leader B&S	... September 16
	Job Posting – Shift Team Leader Refining	... September 16
	Job Posting – Shift Team Leader C&O	... September 16
	Personnel Announcement – Laboratory	... August 26
	Job Posting – John Crane Reliability Technician	... August 25
	Job Posting – Instrument Technician	... July 8

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Title	Personnel Announcement - Training & Development
Body	Dear Colleagues, ██████████ Sr Technical Trainer has elected to retire 31st December 2021. As a result of this, and as part of our site-wide succession planning, I am pleased to announce that ██████████ has been selected to fill the position of Associate Technical Trainer, replacing ██████████ ██████████ was selected for his overall skills, knowledge and experience relative to the criteria of the position. The selection was as a result of the Valero managed moves process and was based on the overall combination of skills, knowledge and attributes relative to the criteria of the position and the appointment was endorsed by the PDC. Please join me in congratulating ██████████ on his new role, and thanking ██████████ for his valued service and wishing him a happy retirement. Karen Muehlbauer Director Safety, Environmental and Human Resources

Expires

Submitted 10/11/2021

Attachment

Created at 10/11/2021 9:56 AM by ■ Gough, Melanie
Last Modified at 10/11/2021 9:56 AM by ■ Gough, Melanie

Close

Employee Handbook

EV 22

Training and Development

Training and development requirements vary and may take many forms from on-the-job coaching and counselling, to attendance on external courses or seminars.

Training needs may be identified in a number of ways:

- *from the Company's goals and objectives;*
- *from the personal performance management cycle;*
- *by the individual themselves.*

If you wish to attend any training courses you should discuss them with your Line Manager. You may be required to attend Company approved courses.

Educational Assistance

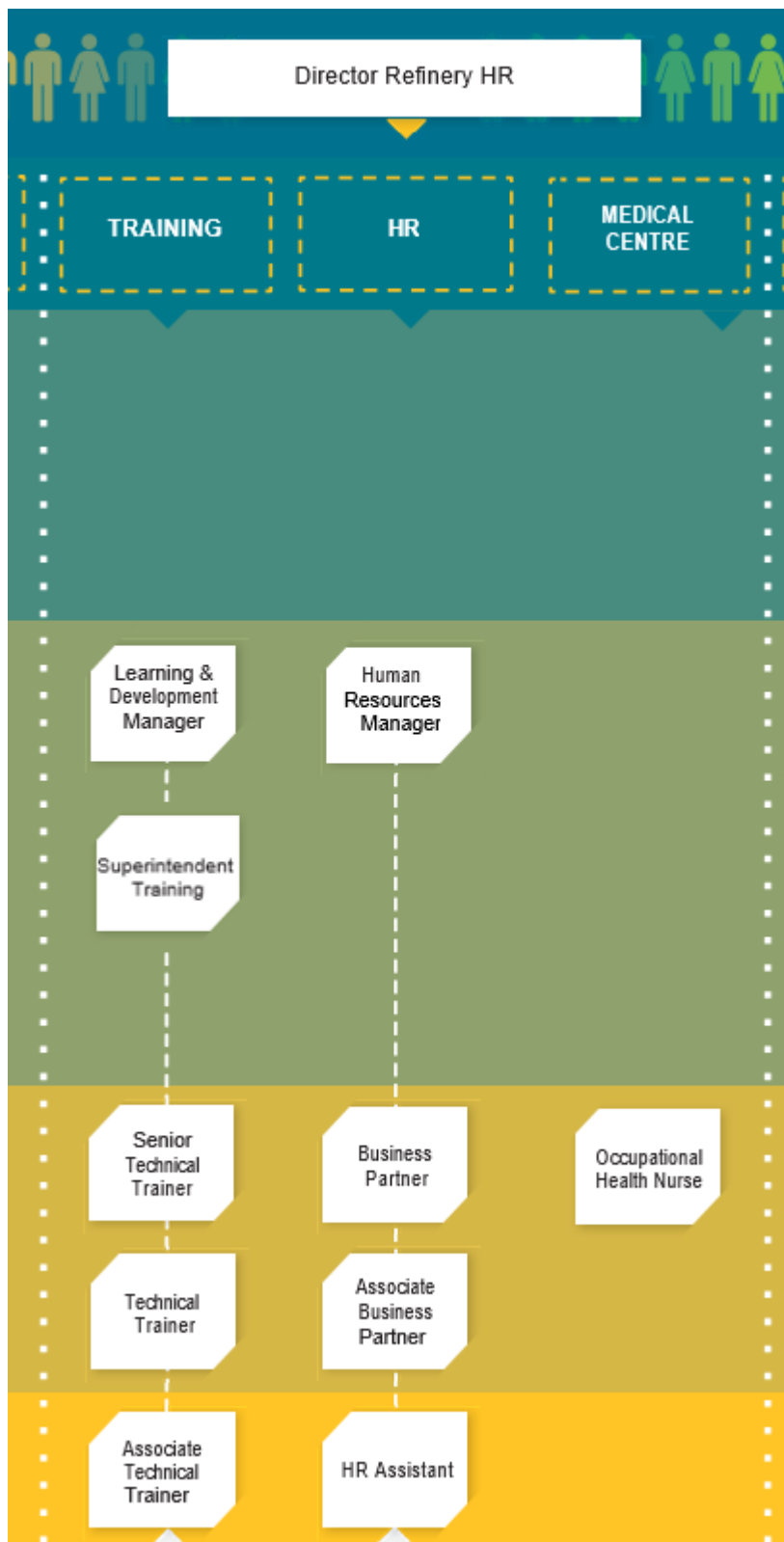
It is the Company's policy to encourage and assist employees to continue their formal education or to take courses to increase their work effectiveness or overall development, the Educational Assistance Plan provides funds for the reasonable costs of tuition, textbooks, laboratory fees, registration and administration fees, after successful completion of approved courses undertaken in the employee's own time.

The Educational Assistance is generally a 75% contribution. However, in certain circumstances where employees may be requested by Management to enrol in courses which are considered to be of direct benefit to the Company or an employee-initiated course may be considered by Management to be of direct benefit to the Company, 100% of the cost of the course (and other related costs as detailed below) will be paid by the Company.

For further information please see Policy E180 Educational Assistance

Development Model

EV 23



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