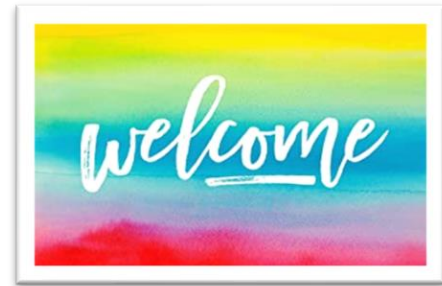# Good morning!

- The class will begin shortly.
- This class will be interactive. Please be prepared for on-camera, verbal, and chat box engagement with the instructor and fellow attendees.

In the chat box, say hello and type the following:
- – Name
- – Agency/Department/Commission
- – Three words to describe Upward Mobility.

# UPWARD MOBILITY COORDINATOR TRAINING



ELI MEDRANO - OFFICE OF CIVIL RIGHTS

APRIL 2023

# Course Objectives

- Discuss the authority for Upward Mobility (UM).
- Assert each department's responsibility to establish and maintain an effective UM Program.
- Demonstrate methods for setting, monitoring, and reporting UM goals.
- Provide UM Program resources.

# Today's Topics

1. Program Definition
2. Authority
3. Classifications
4. Elements of an Effective UM Program:
   - Plan
   - Program Components
   - Coordinator Responsibilities
   - Marketing Methods
5. Program Participation
6. Goal Setting & Reporting Requirements
7. Collaboration
8. Resources

Let's discuss our three-word description for Upward Mobility.



Roundtable Moment 1

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# 1. Program Definition

# Upward Mobility Program Definition

- Program designed to give state employees in Low-Paying Entry-Level (LPEL) classifications an opportunity to advance to more challenging, higher-paying Technical, Professional, and Administrative (TPA) classifications.

- Resource: [Guide for Administering Statewide UM Programs (UM Guide)](#)

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# 2. Authority

# Authority for UM

- [Government Code (GC) 19400-19406](#)
- [California Code of Regulations Title 2 (2 CCR), Sections 599.981-599.986](#)
- [CalHR HR Manual Section 1005 – Upward Mobility Program](#)
- [2 CCR 599.981(e)](#)

- Resource: [UM Webpage](#)

# Assembly Bill (AB) 1604

- AB 1604: Upward Mobility Act of 2022.
- Emphasized UM goal-setting and reporting requirements.

- Resource: [AB 1604 Language](#)

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# 3. Classifications

# Low-Paying Entry-Level (LPEL) Classifications

- Provide little opportunity for advancement.
- Classifications from which employees may advance to entry level TPA/UM classifications.
- Examples

- Resource: UM Guide

# Low-Paying Occupational Groups

| | |
|---|---|
| BL00-BM00 | Horticulture |
| CA00-CZ99 | Office & Allied Services |
| DA00-DZ99 | Custodian & Domestic Services |
| PA00-RZ99 | Mechanical & Construction Trades |
| Varies | Bridging & Career Development Classifications |

Resources: 2 CCR § 599.981(d)
California Civil Service Pay Scales

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# Entry-Level TPA Classifications

- Classifications into which Low-Paying Entry-Level classifications may advance.
- Referred to as the UM classifications.

Resource: 2 CCR § 599.981(g)

# TPA Occupational Groups

AA00-BZ99   Agriculture & Conservation
EA00-FZ99   Education & Library
GA00-IZ99   Engineering & Allied Services
JA00-MZ99   Fiscal, Management, & Staff Services
OA60-OZ99   Legal
SA00-TZ99   Medicine & Allied Services
VA00-VZ99   Protective Services & Public Safety
WA00-ZY99   Social Security & Rehabilitation Services
UA00-UG99   State Emergency Disaster Program

# How do you identify your department's LPEL and UM classifications?

- [2 CCR § 599.981](#)
- Process for Identifying UM Classifications – refer to WFA Manual Pages 118-125
- [UM Pay Scale Report](#)
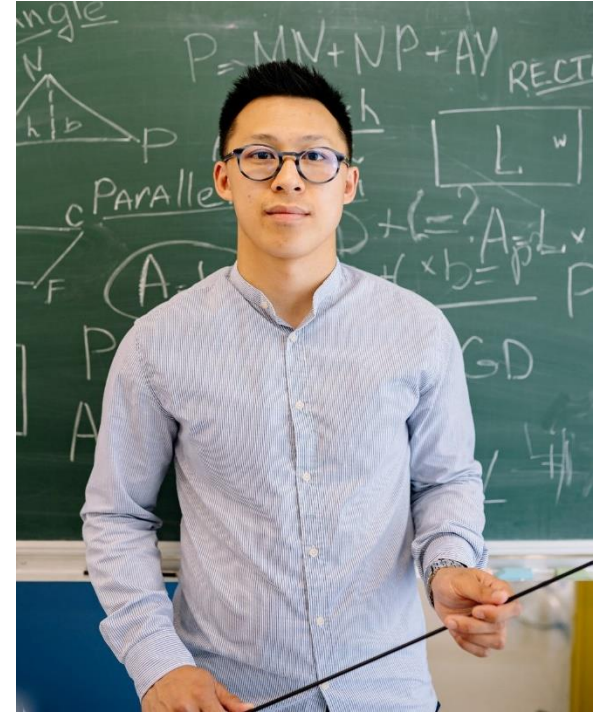
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# 4. Elements of an Effective UM Program

# Upward Mobility Plan

- Policy Statement
- Number of employees in LPEL classifications
- UM Guide:
  - Description of UM components
  - Selection Criteria
  - Roles and Responsibilities

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Resource: [2 CCR 599.983](2 CCR 599.983)

# UM Program Components



- Career Counseling
- Academic Counseling
- Training Opportunities
- Training and Development Assignments
- On-the-job Training
- Job Restructuring

- Resource: GC 19401

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# UM Coordinator Responsibilities

- Coordinate, monitor, and report on the department's UM efforts.

- Resource: 2 CCR 599.982

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# Marketing Methods

- New Employee Orientation
- Targeted LPEL class
- Targeted LPEL/UM class Supervisors
- Newsletter, Intranet, email announcements, career fairs, etc.
- Staff meetings

# 5. Program Participation

# Program Participation Selection Criteria

- UM objectives
- Staffing needs
- Available funds and other resources
- Employee status
- Employee performance in current position
- Employee motivation and potential for advancement
- Training relevance

- Resource: 2 CCR § 599.984

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How would you describe a successful participant in the UMP?



Roundtable Moment 2

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# 6. Goal Setting, Monitoring, and Reporting Responsibilities

# Things to Consider when Establishing UM Goals

- History of UM appointments over at least a three-year period.
- The anticipated number of appointment opportunities.
- Availability of qualified candidates for appointment.

- Resource: 2 CCR 599.985

# Information to Submit to CalHR Annually by June 1:

- UM goals for each entry-level TPA classification.
- Analysis of the department's success in meeting previous year's goals.
- A list of actions demonstrating a good faith effort to comply with the UM mandate.
- Number of UM program participants.
- Amount and percentage of department's annual UM training budget.
- Resource: 2 CCR 599.985

Ponder this:

"Show me your budget and I will tell you what you value."

— Joseph R. Biden, Sr.

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# UM Data Reporting Resources

- Instructions for Identifying UM Classifications – WFA Manual 119-130
- UM Pay Scale Report
- Workforce Analysis Form, Section III
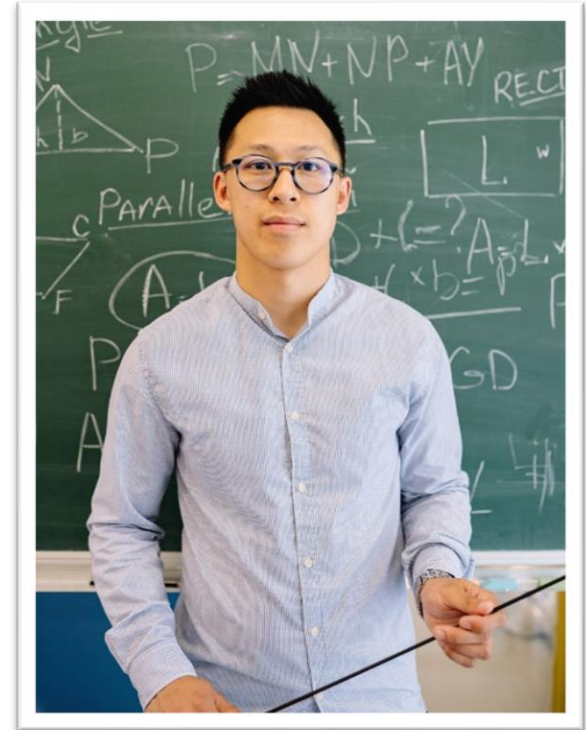
Give examples of how your department demonstrates a good faith effort to implement an effective UMP.



Roundtable Moment 3

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# 7. Collaboration

# CalHR Office of Civil Rights

- Leadership & Education
- Resources
- Oversight
  - Data Collection
  - UM Plan Review
  - Monitoring and approval of action plans
  - Compliance and reporting

# Internal Subject Matter Experts

- EEO Officer
- Human Resources Chief
- Training Officer
- Workforce Development Professional

# Supervisor

- UM marketing
- Individual Development Plan (IDP) and Career Development Plan (CDP) support
- Skills identification and development
- Training
- Assigning work related to CDP

# Employee

- Primary responsibility for own UM.
- Determine career interests, skills, and abilities.
- Establish specific goals that develop career interests.
- IDP and CDP development.
- Maintain a satisfactory level of performance in current job and in academic/training courses.
- Follow through with planned training activities to reach goals and complete a career plan.

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# 8. Highlights of Referenced Resources

# Highlights of Referenced UM Resources:

- CalHR HR Manual – UM Program Policy
- CalHR OCR – UM Webpage
- CalHR OCR – UM Guidelines
- UM Pay Scale Report
- WFA and Census of Employees Webpage
- WFA Form

**STAY CONNECTED!**
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