

Developing a Workforce Plan: Setting the Foundation – Session 3

Slide 1 – Developing a Workforce Plan Session 3

Presented by CalHR's Statewide Workforce Planning and Recruitment Unit

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Slide 2 – Objectives

Identify Recruitment, Retention, Succession Planning Strategies

Develop the workforce plan

Implement and evaluate the plan

Workforce Plan examples

Slide 3 - 3 Risk Areas of Workforce Planning

1. Recruitment

2. Retention

3. Succession Planning

Develop strategies that mitigate risks based on gap analysis findings

Slide 4 – Gap Analysis Methodology

Bring together your data from supply and competency gaps to define the overall workforce gap for each classification

Slide 5 – Targeting Strategies

Align with strategic missions/goals

Utilize data to expose opportunities

Prioritize by key classifications and competencies

Slide 6 – Recruitment Strategies

Utilize Data: high competency gaps, high vacancy rates

Tailor recruitment strategies

Hiring processes:

Exams

Application screening

Behavioral interviewing

Slide 12 – Contact the Statewide Recruiter

Brandon Littlejohn

Statewide Recruiter

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Slide 13 – Retention Strategies

Utilize data: high turnover, high transfer patterns

Employee satisfaction survey

Input from division/program management

Retention Strategy Survey (when available)

Slide 14 – Examples of Retention Strategies

Employee recognition program

Knowledge transfer opportunities:

New Employee Onboarding

Slide 15 – New Employee Orientation v. Onboarding

Orientation and onboarding are different processes

Onboarding represents a form of institutional knowledge transfer while orientation is simply transfers explicit knowledge

Slide 16 – New Employee Orientation

Focus on transactional processes (ie: computer set-up, acquiring name badge)

Less than 1 week

Executed by designated division/program

Addresses benefits and provides departmental overview

Employee participation is passive

Establishes new hires into department

Slide 17 – Onboarding

Assimilation process focused on tools and knowledge to be successful

Includes 1st year

Integrates multiple functions/individuals

Addresses all new employee needs over long-term period

Employee participation is active

Aims to increase likelihood of retention and productivity

Slide 18 – Onboarding at the Department of Technology

Download the [New Employee Onboarding Plan](#) from the Department of Technology

Slide 19 – Succession Planning

Purpose: Mitigate separation risks

Process: Recognize, develop, and retain leadership talent especially in critical classifications

Product: Practical strategies to develop a pipeline of future leaders

Slide 20 – Succession Planning Strategies

Voluntary nomination to leadership development program

Knowledge transfer opportunities

Slide 21 – Knowledge Transfer Goals

Mitigate retention and separation risks

Develop current workforce

Ensure important knowledge is not lost

Slide 22 – Types of Knowledge

Explicit = concrete:

Procedural knowledge

Tacit = experiential:

Personal characteristics

Development of cooperative partnerships

Both:

Institutional knowledge

Slide 23 – Examples of Explicit Knowledge Transfer Strategies

Individual professional development

Desk manuals

Online options

Orientation

Slide 24 – Examples of Tacit Knowledge Transfer Strategies

Coaching

Career development

Slide 25 – Examples of Institutional Knowledge Transfer Strategies

Group activities

Cross-training

Mentorship

Job shadowing

Onboarding

Slide 26 - Knowledge Transfer at Caltrans

Download the [Knowledge Transfer Guidebook](#) from Caltrans

Slide 27 – Benefits of Mentorship

Builds bench strength

Provides global perspective

Strengthens diversity

Engages staff in departments mission

Supports succession planning

Fosters trust, respect and openness

Slide 28 – Mentorship Best Practices

Voluntary participation

Identify development goals

Respect confidentiality in sessions

Respect each other's time

Slide 29 – Informal Mentorship at CalPERS

Download the [Informal Mentoring Toolkit for Managers and Supervisors](#) from CalPERS

Download the [Informal Mentoring Toolkit for Executives and Senior Leaders](#) from CalPERS

Slide 30 – Workforce Plan Template

Download the [Workforce Plan Template](#)

Slide 31 – Establish Metrics

Specific

Measureable

Achievable

Realistic

Time-Bound

Slide 32 – Communicate the Plan

Plan to communicate to stakeholders about progress in a relevant and timely manner:

Who needs to know what? How often? In what way?

Refer to Workforce Plan Template Appendix D (page 10)

Keep department engaged:

Share workforce and succession planning articles

Advertise professional development opportunities

Maintain employee recognition program

Slide 33 – Implement the Plan

Follow the Action Plan Benchmarks and Communication Plan you have developed for each initiative

Slide 34 – Evaluate the Plan

Download the [Workforce Planning Evaluation Assessment Tool](#)