Competency Based Performance and Development

The CalSTRS Cross-functional Approach

Presented by:
Brenna Neuhaarth, Kristel Turko and Katie Valdivia
Presenter Introductions

• Brenna Neuharth
  • Manager of Workforce Planning
• Kristel Turko
  • Manager of Selection Services, Classification and Compensation and Labor Relations
• Katie Valdivia
  • Manager of Organizational Development
Kick off Questions

• Who is seeing recruitment challenges?
  • Technical v. Behavioral

• Do you know where your employee service overlaps are?
  • Performance v. Development

• Who has started incorporating Competencies into your programs?
Here is what we hear

• Of course you can do it, you’re CalSTRS you have money!

• Wow, it’s a much longer process and bigger project than we thought.

• How many metrics should we be tracking?

• What kind of technology are you using?
Here is our reality

- The Fund has money – it’s a fact
- Stewardship – it’s a way of life
- Collaboration – it’s the cultural norm
- Teamwork – it’s our recipe for success
- Technology – MS Office and TRAIN
- Transparency – it’s how we stay accountable
Here are some low cost ideas

• Begin identifying sources of data and building tracking systems
• Collect, analyze and report
• Use existing resources and repurpose
  • CalHR, SHRM, Other Agencies
• Find your internal Champions and Evangelists
• Build your network of external contacts
• Collaborate with your HR Colleagues
Here is how we do what we do

Strategic Competency-based Alignment

• Core + Classification Family Competencies

• Putting it all together – Cross-functionally
  • Recruitment and Selection
  • Proactive Performance Management
  • Professional Development and Life-long Learning
Competency Identification

2007 – 2009 Identified Competencies

• Organization-wide effort
• Focus Groups
• Subject Matter Experts (SME) at all levels
• Validated by Staff and Leadership
Competencies Established

The Results:

• CalSTRS Core Competencies
• Classification/Job Families
  • Classification Family Competencies
• CalSTRS Competency Library Created
  • Continues to be updated as new classifications are added
Competency Bridging

2012 Identified Executive Key Drivers

• One-on-one Executive interviews
• Compiled answers, reviewed and prioritized drivers
• Mapped to CalSTARS Competency Library
• Identified Leadership Competencies by level
2015 Identified Investments-specific

- Investment staff and Leadership SME focus groups
- Validated through survey
- Aligned to Compensation and Incentive Plan
- Mapped for Sustainable Learning and Development
Bridging Outcomes

CalSTRS Leadership Pipeline Model
• Executive to Frontline Manager/Supervisors

CalSTRS Investments Pipeline Model
• Investment Officer I to Chief Investment Officer
Employee Performance Management Cycle

- Planning work, setting expectations
- Observing individual performance
- Recognizing successful performance
- Evaluating performance
- Developing the capacity to perform
Competency Development Cycle

- Workforce Planning
- Learning and Development
- Selection Services and Classification and Compensation
Cross-functional Benefits - Internal

- Cross training and knowledge transfer
- Breakdown silos and build the team
- Process improvements and efficiencies
- Identify overlapping and/or close service gaps
- Multiple perspectives = better outcomes
- Maximize limited resources!
Cross-functional Benefits – Org-wide

- High performance culture focused on goal achievement
- Demonstrable increase in skill, knowledge, abilities
- Improved services to internal/external customers
- Satisfied and engaged employees
- High internal promotion/reduction in turnover
- HR viewed as experts in talent management
  - No more shopping for answers
Cross-functional Challenges

• Operational work must continue
• Time and Resources constraints
• Communication and coordination
• Constant change/flexibility/agility
• Highly visible and impacts entire workforce
• Buy-in/cooperation for matrix management and shifting workload
Cross-functional Recommendations

• Stay Strategic

• Communication Champions/Evangelists

• Include all impacted parties in development
Implementation - Performance

Proactive Performance Management

• Competency-based Annual Performance Reviews
• Year-round Performance Management  
  – Preventative, corrective and adverse
• Annual reporting delivered to Executive
• Hi/Lo report for Training Services in support of Training Needs Assessment
Implementation - Development

Professional Development Program

- Pre-hire
- Onboarding
- Development
- Career Mastery
- Offboarding/Separation/Retirement
Learning and Development

• Almost 200 onsite course offerings a year that are aligned to CalSTRS Competency library.
• Academies for Analysts and Leaders
• Blended and informal learning opportunities
• Trusted resource in the organization
• Online resources and tools on SharePoint sites and Intranet
• Annual Learning Expo
Leadership Development

- Executive Development Program
- Masters Series
  - In development
- Managers Academy
- Specialized Learning
- Leadership Forums & Tool Kit
- Cohort Learning
Staff Development

- Emerging Leadership Series
- Lead Person Training
- Analyst Academy
- Pre-Analyst Academy
- Specialized Learning and Development
- Upward Mobility
Ongoing Challenges

• Specialists
• Flexibility
• Compensation and Incentives
• Communication
• Labor Relations
Top Tips for Success

• Be patient and flexible
• Be transparent
• Be resourceful and creative
• Be realistic yet persistent
Your Questions Answered
Today, tomorrow and in the future.

• bneuharth@calstrs.com  (916) 414-4927
• kturko@calstrs.com    (916) 414-4954
• kvaldivia@calstrs.com (916) 414-4943