**Agenda**

### Morning Schedule

**8:30 a.m.**
- Opening Session...Joseph A. Farrow, CHP Commissioner
  - Gymnasium
- Welcome...Pat McConahay, Communications Director, CalHR
- Video...Julie Chapman, Director, CalHR
- Conference Welcome...Julie Chapman, Director, CalHR
- SPB: What To Expect In the Year Ahead...Suzanne Ambrose, Executive Officer, SPB
- Robert L. Negri Human Resources Achievement Award...Howard Schwartz, Chief Deputy Director, CalHR
- Key Note Address...Marybel Batjer, Secretary, CA Government Operations Agency
- Conference Kickoff...Julie Chapman, Director, CalHR

**9:30 a.m.**
- Union Access...Gymnasium
- Big Happenings in Health Benefits: New HMO Plans for 2014; Dependent Eligibility Verification...Classroom 3
- Accessible Documents and Why it’s Important to Create Them...Classroom 4
- Current Hot Topics in the Personnel Services Branch...Classroom 5
- Progressive Discipline...Classroom 10
- Board Items and Class Specification Revisions...Classroom 11
- State Personnel Board Compliance Review...Executive Dining Room

**11:00 a.m.**
- Executive Panel Discussion...Gymnasium
- Selection Systems – Past, Present, and Future...Classroom 3
- Statewide Learning and Performance Management...Classroom 4
- The Savings Plus Retirement Program is with You for Life...Classroom 5
- Rejection During Probation...Classroom 10
- Transfer Determinations...Classroom 11
- Maximizing the Strengths of a Multi-Generational Workplace...Executive Dining Room

**11:45 a.m.**
- Lunch begins...Cafeteria

You must have purchased your lunch ticket at registration and you will need to present it to the lunch attendant.

### Afternoon Schedule

**1:30 p.m.**
- Executive Panel Discussion...Gymnasium
- Big Happenings in Health Benefits: New HMO Plans for 2014; Dependent Eligibility Verification...Classroom 3
- Accessible Documents and Why it’s Important to Create Them...Classroom 4
- Current Hot Topics in the Personnel Services Branch...Classroom 5
- Advanced LR’s Do’s and Don’ts...Classroom 10
- Statewide Learning and Performance Management...Classroom 11
- Board Items and Class Specification Revisions...Executive Dining Room

**3:00 p.m.**
- Individual Development Plans and Performance Appraisals – Building Better Employees...Gymnasium
- Selection Systems – Past, Present, and Future...Classroom 3
- Transfer Determinations...Classroom 4
- State Personnel Board Compliance Review...Classroom 5
- Maximizing the Strengths of a Multi-Generational Workplace...Classroom 10
- The Savings Plus Retirement Program is with You for Life...Classroom 11
- Union Access...Executive Dining Room
**Presentations**

**8:30 a.m.**

**Opening Session**
Gymnasium - refer to schedule of presenters on page 4

**9:30 a.m.**

<table>
<thead>
<tr>
<th>Union Access</th>
<th>Current Hot Topics in the Personnel Services Branch</th>
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<tbody>
<tr>
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<td>Classroom 5</td>
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<td>Presenters: Lori Green, Andres Mejia</td>
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**Big Happenings in Health Benefits: New HMO Plans for 2014; Dependent Eligibility Verification**
Classroom 3
Presenters: Ralph Cobb, Michelle Garbato, Elaine Smith
This session will enable HR staff to effectively assist employees in understanding the expanded health plan offering for 2014; provide HR staff an understanding of their role in the dependent eligibility verification project; and enable HR staff to assist employees in complying with verification requirements.

**Accessible Documents and Why it’s Important to Create Them**
Classroom 4
Presenter: Joe Krack
This workshop will raise awareness regarding the importance of developing accessible documents to promote and build an inclusive workforce and provide equitable services. Attendees will learn practical examples of why it is important to create accessible documents, identify impacts to equality when accessibility considerations are implemented, and how to overcome common barriers of document accessibility.

**A customer is the most important visitor at our workplace. They are not dependent on us – we are dependent on them.**

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"Unknown"
Executive Panel Discussion
Gymnasium
Presenters: Howard Schwartz, Anne Stausboll, Joan Markoff
Do you work in an environment that values customer service? Are we ensuring that employees have the right tools to deal effectively with the public? Come hear a leadership discussion on how to improve customer service functions. Find out what you can do to train and motivate employees to provide high quality services to the public.

Selection Systems – Past, Present, and Future
Classroom 3
Presenter: Gina Forman
Examinations and Certification Processes seem to be ever changing with the myriad of necessary systems in the State Hiring Process. This presentation will outline the current systems and processes and the timelines of what to expect and when through the various phases of the Exam and Cert Online System (ECOS) project implementation.

Statewide Learning and Performance Management
Classroom 4
Presenter: Guy Burghgraef
CalHR's Statewide training team will provide an overview of the State's leadership competency model and how performance management, coaching and mentoring, and interpersonal skills are essential for leaders. CalHR will also provide a detailed overview of the new State Training Centers services including the calendar of instructor-led classes and the wealth of training, consulting, and other services available through our newly established partnership with the UC, CSU, and CA Community Colleges. Participants will also be given a detailed overview of the thousands of free on-line resources available for state employees.

The Savings Plus Retirement Program is with You for Life
Classroom 5
Presenters: Kelly Richmond, Tiffanie Vick, Anthony Donatelli
Savings Plus strives to simplify your retirement planning needs and educate your employees about the benefits of the state's lifetime supplemental retirement program. In this course we will introduce you to new tools, features and an array of upcoming free training classes offered to you and your employees throughout the state.

Always be a first-rate version of yourself.
-Audrey Hepburn

Rejection During Probation
Classroom 10
Presenters: Nikki Mozdyniewicz, Keith LaMar
The probationary period is the final phase of the selection process because no one becomes a permanent civil service employee without passing the demonstration phase of selection, the probation period. As a supervisor, you are responsible for assessing and reviewing your employee's work; completing timely probation reports; determining training needs; and ultimately deciding whether this person has demonstrated she can really do the job you hired her to perform. You have exactly six months (or a year in some cases) to decide. This session will provide supervisors with an understanding of the roles and responsibilities new employees and supervisors have during the probationary period; how to stay on top of the process; how to prepare a probation report; the do's and don'ts of issuing a rejection during the probation period; and the process the employee may follow to appeal that rejection.

Transfer Determinations
Classroom 11
Presenters: Jamie Inderbitzen, Vanessa Singh
This course is designed to provide participants with information on how to apply transfer regulations and determine when a transfer is permissible. The focus of the presentation is on the legality of voluntary transfers made between classifications. Participants will be provided with the necessary tools and resources to ascertain the validity of transfers as it relates to the regulations governing transfers and the Civil Service Act.

Maximizing the Strengths of a Multi-Generational Workplace
Executive Dining Room
Presenters: Erica Salinas, Danielle Metzinger
Maximizing the Strengths of a Multi-Generational Workplace is about succession planning and the four generations in our current workforce. We will present each generation's unique characteristics and strengths, and how they can be leveraged effectively for employee retention and succession.
Presentations

1:30 p.m.

Executive Panel Discussion
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Presenters: Kim Herlache, Maria Pires-Molina, Mary Sue Paul
This class will discuss the current issues and projects the Personnel Services Branch staff are working on with various departments. It will also provide an opportunity for input from departments to identify future training areas.

Advanced LR’s Do’s and Don’ts
Classroom 10
Presenters: Randy Fisher, Paul Starkey
In this interactive session about labor relations do’s and don’ts, this workshop will explore “best practices” for effective labor relations. We will identify situations that can cause labor relations “headaches” and offer prescriptions for immediate relief. In this session, you will also learn how to identify and address labor relations “warning symptoms” and will hear about tips for prevention, including when and how to call in the specialists at CalHR Labor and Legal.

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Board Items and Class Specification Revisions
Executive Dining Room
Presenters: Nicole Holtzman, Debbie Dolenga
This class is designed to provide participants with a thorough understanding of the Board Item process and class specification revisions. It includes the following topics: Board Meeting dates and time frames, Consent/Non-Hearing Calendar Items, Classification Board Item Process (Department’s Role and CalHR’s Role), Union Notification, and Pay Letter Preparation. It also provides participants with an overview of the process to revise class specifications.

Undertake not what you cannot perform but be careful to keep your promise.

-George Washington
Individual Development Plans and Performance Appraisals – Building Better Employees

Gymnasium
Presenters: David J. Neill, Stephen Palazzo

This interactive workshop will provide an overview of Individual Development Plans (IDPs) and Performance Appraisals and their importance as an effective management tool in the evaluation, development, and mentoring of employees. The workshop will address the role of both the supervisor and employee in the IDP and Performance Appraisal development process, tips for supervisors to facilitate the preparation of IDPs and Performance Appraisals, the importance of honest, timely, and constructive feedback to employees, and mistakes to avoid in the preparation of IDPs and Performance Appraisals.

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State Personnel Board Compliance Review

Classroom 5
Presenters: Michael Brunette, Diana Campbell

This workshop will provide an overview of the State Personnel Board’s compliance review of Department’s Examinations, Appointments, Personal Services Contracts, and EEO Programs. Information on SPB’s methodologies in these areas will be shared, including common themes and/or deficiencies found, and areas where departments are excelling or need improvement.

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