

**Excerpts from
“Developing a Workforce
Plan: Setting the Foundation”
Training Presentation**

Presented by

CalHR’s Statewide Workforce Planning and
Recruitment Unit

Secure Executive Support

- Barriers to support
- **Cost** context
 - Budget
 - Productivity
- Statewide issue
- Plan to use existing resources

Maintain Executive Support

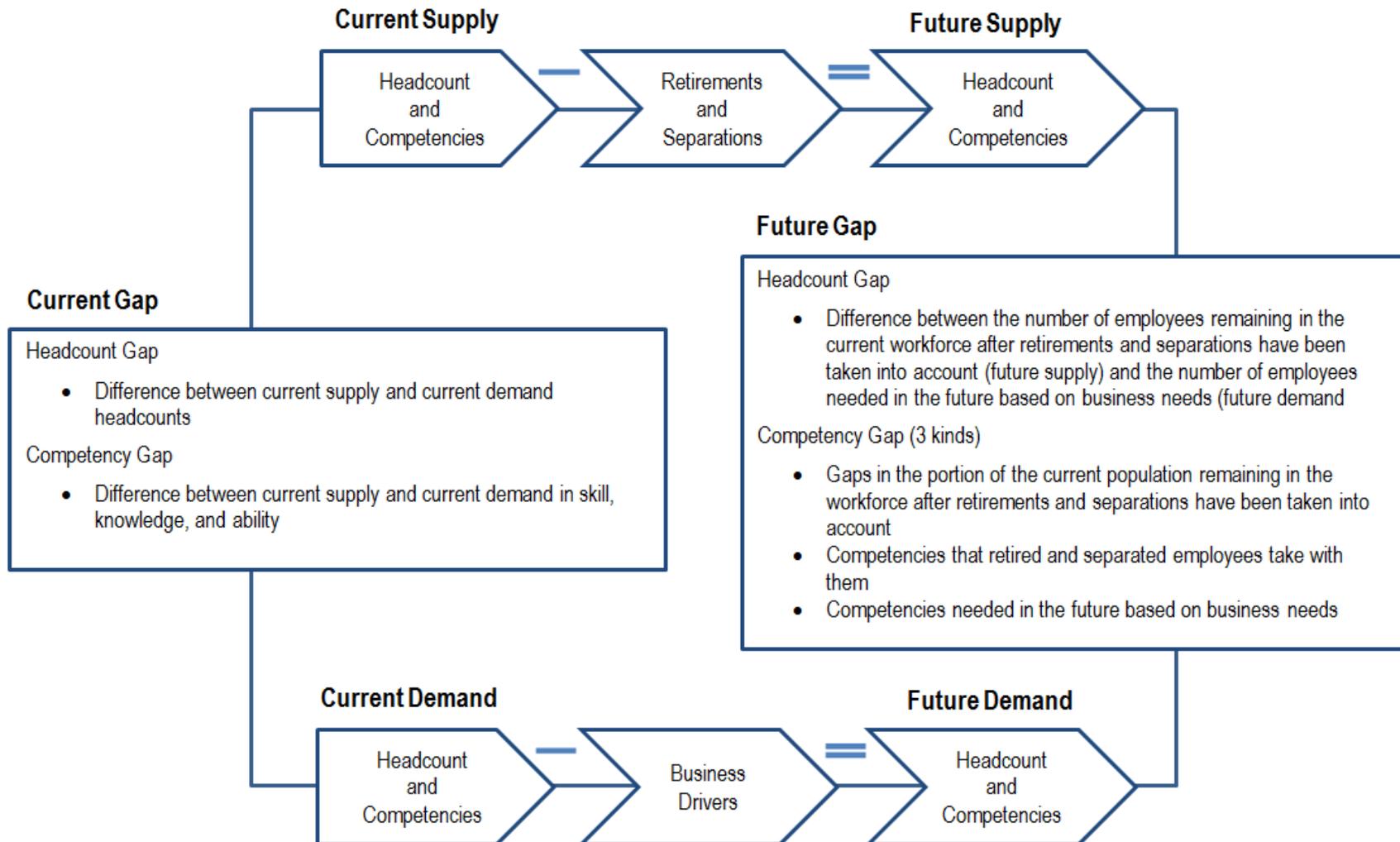
- Maintain involvement and communication
- Present salient facts from gap analysis to leadership
- Show need for developing specific strategies
- Explain specific resources needed and how they will solve the problems
- No end surprises

3 Risk Areas of Workforce Planning

1. Recruitment
2. Retention
3. Succession Planning

Develop strategies that mitigate risks based on gap analysis findings

Gap Analysis Methodology



Targeting Strategies

- **Align** with strategic missions/goals
- **Utilize data** to expose opportunities
- **Prioritize** by key classifications and competencies

Recruitment Strategies

Utilize Data: high competency gaps, high vacancy rates

- Tailor recruitment strategies
- Hiring processes
 - Exams
 - Application screening
 - Behavioral interviewing

Contact the Statewide Recruiter

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Retention Strategies

Utilize data: high turnover, high transfer patterns

- Employee satisfaction survey
- Input from division/program management
- Retention Strategy Survey (when available)

Examples of Retention Strategies

- Employee recognition program
- Knowledge transfer opportunities
 - New Employee Onboarding

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

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

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
- Employee participation is active
- Aims to increase retention and productivity

Onboarding at the Department of Technology

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

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

Succession Planning Strategies

- Voluntary nomination to leadership development program
- Knowledge transfer opportunities

Knowledge Transfer Goals

- Mitigate retention and separation risks
- Develop current workforce
- Ensure important knowledge is not lost

Types of Knowledge

- Explicit = concrete
 - Procedural knowledge
- Tacit = experiential
 - Personal characteristics
 - Development of cooperative partnerships
- Both
 - Institutional knowledge

Examples of Explicit Knowledge Transfer Strategies

- Individual professional development
- Desk manuals
- Online options
- Orientation

Examples of Tacit Knowledge Transfer Strategies

- Coaching
- Career development

Examples of Institutional Knowledge Transfer Strategies

- Group activities
- Cross-training
- Mentorship
- Job shadowing
- Onboarding

Knowledge Transfer at Caltrans

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

Benefits of Mentorship

- Builds bench strength
- Provides global perspective
- Strengthens diversity
- Engages staff in departments mission
- Supports succession planning
- Fosters trust, respect and openness

Mentorship Best Practices

- Voluntary participation
- Identify development goals
- Respect confidentiality in sessions
- Respect each other's time

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

Workforce Plan Template

Download the [Workforce Plan Template](#)

Establish Metrics

- Specific
- Measureable
- Achievable
- Realistic
- Time-Bound

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