Welcome to the California Leads Conference

• The presentation will begin shortly.
• All participants will be muted upon entry.
• Live presentations will not be recorded.
• Please use the chat feature to direct questions to “All panelists.” When submitting questions, please do not include any personal information.
• Connecting to audio – “Call using computer” for audio to come through your computer speakers or use “Call in/Call me” feature.
Framework for Collecting and Analyzing Workforce Data

Sharmayne Long, CalHR Statewide Workforce Planning Consultant

Guest Speakers:
Annette McFarland, CalHR Compensation Analyst
Prab Dip Boparai, Department of Child Support Services Organizational Development and Training Manager
Why Are We Here?

Learn effective and efficient ways to gather and analyze workforce data.
Collecting and Analyzing Workforce Data

Benefits

Helps to:

- Identify workforce challenges and risks
- Evaluate opportunities for increased recruitment and retention
- Inform and focus workforce planning and succession management efforts
- Make compelling budget change proposals
## Types of Data to Collect

<table>
<thead>
<tr>
<th>Quantitative</th>
<th>Qualitative (if available)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Demographics (age, gender, ethnicity, disability status, veteran status)</td>
<td>• Competency assessment results</td>
</tr>
<tr>
<td>• Position information (classification, tenure, time base, salary)</td>
<td>• Entrance, stay, and exit survey results</td>
</tr>
<tr>
<td>• Appointments</td>
<td>• Employee engagement survey results</td>
</tr>
<tr>
<td>• Separations</td>
<td>• Organizational health index survey results</td>
</tr>
<tr>
<td>• Vacancy rates</td>
<td></td>
</tr>
</tbody>
</table>
## Data Collection Sources

<table>
<thead>
<tr>
<th>Quantitative</th>
<th>Qualitative (if available)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• State Controller’s Office Management Information Retrieval System (MIRS)</td>
<td>• Refer to the area within your organization that conducts workforce related assessments and surveys</td>
</tr>
<tr>
<td>• Departmental reports</td>
<td></td>
</tr>
<tr>
<td>• Statewide reports</td>
<td></td>
</tr>
<tr>
<td>• National reports</td>
<td></td>
</tr>
<tr>
<td>• Other human resource management system (if available)</td>
<td></td>
</tr>
</tbody>
</table>
Departmental Report: MIRS COM30

- Displays a list of **current** employee information
  - Active and temporarily separated
- Download from the State Controller’s Office MIRS Common Library
- Gather report on a monthly basis
- At minimum, establish a baseline of workforce data to analyze with six months worth of COM030 reports
### Framework for Collecting and Analyzing Workforce Data

#### Departmental Report: MIRS COM31

<table>
<thead>
<tr>
<th>MONTH</th>
<th>NAME</th>
<th>TRANS. CODE</th>
<th>EST. DATE</th>
<th>LAST FOUR OF SSN</th>
<th>BIRTHDATE</th>
<th>AGE</th>
<th>SEX</th>
<th>ETHIC CODE</th>
<th>ETHIC NAME</th>
<th>CLASS</th>
<th>CLASS TYPE</th>
<th>POSITION NUMBER</th>
<th>POS. CODE</th>
<th>UNIT</th>
<th>CLASS CODE</th>
<th>SRL NUM</th>
<th>TEL</th>
<th>TIME BACK</th>
<th>CBD</th>
<th>SAFETY CODE</th>
<th>CNTY CODE</th>
<th>ALT CODE</th>
</tr>
</thead>
<tbody>
<tr>
<td>012021</td>
<td>MELLOR, MARSHA</td>
<td>501</td>
<td>1/1/2021</td>
<td>1234</td>
<td>9/14/1982</td>
<td>37</td>
<td>F</td>
<td>E</td>
<td>WHITE</td>
<td>460</td>
<td>GOVIL PORG AVL</td>
<td>987-654-5393-000</td>
<td>587</td>
<td>604</td>
<td>5393</td>
<td>701</td>
<td>P</td>
<td>FT</td>
<td>R01</td>
<td>MIS</td>
<td>34.A</td>
<td></td>
</tr>
<tr>
<td>012021</td>
<td>O'SUN, RAY</td>
<td>401</td>
<td>1/1/2021</td>
<td>5678</td>
<td>2/1/1986</td>
<td>30</td>
<td>F</td>
<td>G</td>
<td>ASIAN</td>
<td>460</td>
<td>OFF TECH (TYPING)</td>
<td>987-456-1139-000</td>
<td>587</td>
<td>456</td>
<td>1139</td>
<td>502</td>
<td>P</td>
<td>FT</td>
<td>R04</td>
<td>MIS</td>
<td>34.A</td>
<td></td>
</tr>
</tbody>
</table>

- Displays **employees with appointments and separations**
- Includes employee information at the time of transaction
- Download from the State Controller’s Office MIRS Common Library
- When gathering for the first time, include the start date of the previous 24-month timeframe through the end of the most recent month
- Moving forward, gather on a monthly basis
Other Departmental Reports

CalHR Workforce Analysis

Each state department’s civil service employee demographic data

CalHR HR Net Database

Each state department’s exempt classifications, established, vacant and filled positions data
Statewide Reports

- CalHR Workforce Analysis: California civil service employee demographic data
- CalHR Workforce Planning Statistics: California civil service employee age and retiree demographic data
- CalHR Compensation Surveys: Compensation for California civil service employees compared with local gov’t, federal gov’t and the private sector
- Employment Development Department: California labor market information
National Reports

**U.S. Bureau of Labor Statistics**
National employment and economic data

**U.S. Census Bureau**
National data about people, places and the economy
Total Compensation Report

Annette McFarland,
Compensation Analyst
CalHR Financial Management Division
Total Compensation Report

Departments

January 25, 2021. Effective May 1, 2018, CalHR implemented the Bicycle Commuter Program (Program). Through the Program, the State of California voluntarily provides a taxable benefit to eligible state employees. The Program encourages employees to consider bicycle commuting as a means of active transportation.

As a reminder, the HR Manual section 1425 – Bicycle Commuter Program requires non-CalATERS departments to complete and electronically submit the Bicycle Commuter Benefit Program Report for the previous calendar year to CalHR (Travelmanager@calhr.ca.gov) by January 31.

2021 Monthly Deduction Amount for the Third Party Pre-Tax Parking Reimbursement Account Program

January 25, 2021. For 2021, the monthly limit for a Third Party Pre-Tax Parking Reimbursement Account Program deduction from an employee’s income to pay for qualified parking will be $270. This amount is a continuation of the monthly limit in effect for 2020.

2021 Mileage Reimbursement Rates for Use of Personal Vehicle
Total Compensation Surveys

Government Code section 19826(c) and provisions of the Budget Act require CalHR to compare total compensation of State of California employees with employees working in comparable occupations in local government, federal government, and the private sector.

Beginning in 2013, the report compared of State of California employee wages, pay differentials, health benefits, retirement, paid leave, and other compensation. Prior to 2013, the report compared the maximum salaries and maximum benefits of State of California employees with the median maximum salaries and median maximum benefits paid to employees performing similar work at local public sector employers throughout California.

- 2018 California State Employee Total Compensation Report (bargaining units 9, 10, 12, 16, and 19)
- 2018 California State Employee Total Compensation Report (RTF)
What is the Total Compensation Report?

Requirements
- Required by Government Code 19826 and the Budget Act, Chapter 23.
- Completed 6 mo. prior to contract expiring.

Wage and Benefits
- Compares state wages and benefits at the detailed occupation level with local government, private sector and federal government.

Demographic Data
- Includes state employee demographics for each occupation and at the bargaining unit level.
Total Compensation Report

What Demographic Data is in the report?

• Age and Length of State Service
• Gender
• Average Age and Years of Service at Retirement
• Vacancy Rates
• Separation Rates
• Retirement Rates
• Turnover Rates
Total Compensation Report 7 of 7

Gap Analysis

• How do your employee demographics compare to the statewide average?
  – Are your employees younger?
  – Does your department have high turnover?
  – Does your department have high vacancies?

• How many of your employees are likely to retire?
  – Look at average age and length of state service at retirement.
HR Net

What data can you find on HR Net?

Pay Scales
- Min and Max Pay
- Updated monthly

Established/Vacant Report
- Use to find vacancy rates
- Updated monthly

More HR Resources
- Pay Letters, Pay Differentials, Filled Position Database, Etc.
Workforce Data Workbook Template Reports

- Demographics
- Generational breakout
- Retirement eligibility
- Separations
- Turnover rates
Workforce Data Workbook Instructions

1. Requested Workforce Reports

Requested Workforce Reports
The workforce reports requested below will be used to populate the CalHR Workforce Data Workbook.

Important Notes:
Employee information within MIRS is only available to reflect the past 24 months, therefore, your organization WILL NEED to run the following reports on a monthly basis to obtain the most accurate employee information listed in the MIRS Elements and Definitions now and moving forward.

- COM030 – This report will display a list of current employee information (active and temporarily separated).
- COM031 – This report will display a list of employees with appointments and separations in the past 24 months. It includes employee information at the time of the transaction.

☐ Gather the most current month’s COM030 report
- Moving forward, you will need to run this report monthly.
- To have a baseline for analyzing separation data, it is recommended to have a minimum of COM030 reports for 6 months to complete the Turnover Worksheet.
### Workforce Data Workbook Separations Report Example

#### Separation Snapshot

<table>
<thead>
<tr>
<th>12-month Timeframes</th>
<th>Voluntary Separations</th>
<th>Retirements</th>
<th>Involuntary Separations</th>
<th>Health/Disability/Family</th>
<th>Total Separations</th>
</tr>
</thead>
<tbody>
<tr>
<td>February 2018 - February 2019</td>
<td>25</td>
<td>10</td>
<td>0</td>
<td>2</td>
<td>37</td>
</tr>
<tr>
<td>February 2019 - February 2020</td>
<td>15</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>25</td>
</tr>
<tr>
<td>February 2020 - February 2021</td>
<td>25</td>
<td>10</td>
<td>0</td>
<td>2</td>
<td>37</td>
</tr>
<tr>
<td>February 2021 - February 2022</td>
<td>22</td>
<td>5</td>
<td>0</td>
<td>2</td>
<td>33</td>
</tr>
</tbody>
</table>

*Formulas to determine future trends are pre-populated. The chart provided should populate once the table contains data.*

*The formatting of this workbook is based on Microsoft 2016 capabilities. Other versions may be impacted differently.*
Operationalize Workforce Data

Prabdiip Boparai,
Organizational Development and Training Manager
Department of Child Support Services (DCSS)
Data Collection: Why & How

1. -Tells a Story
   -Workforce Status
   -Don’t Know What You Don’t Know

2. -MIRS Reports
   -Organizational Charts
   -EMACs

3. -Routine Reporting
   -Report to Exec/Stakeholders
   -Paint the Picture
Data Security

- Personnel Data is confidential
- Employee privacy is covered by California’s privacy laws
- Information Practices Act

It is your responsibility to protect the data from any unauthorized disclosure.
Questions and Answers
Resources 1 of 2

• Sources for Departmental Reports
  – State Controller’s Office Management Information Retrieval System
  – CalHR Workforce Analysis
  – CalHR HR Net Database

• Sources for Statewide Reports
  – CalHR Workforce Analysis
  – CalHR Workforce Planning Statistics
  – CalHR Compensation Surveys
  – Employment Development Department Labor Market Information
Resources 2 of 2

- **Sources for National Reports**
  - U.S. Bureau of Labor Statistics
  - U.S. Census Bureau

- **CalHR Workforce Data Workbook Template**
- **CalHR Workforce Data Workbook Template Instructions**
- **DCSS Workforce Data Workbook Template**
- **DCSS Workforce Data Reporting Dashboard**
Let’s Continue the Conversation!

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- **Prab dip Boparai, DCSS**
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