

Competency Based Performance and Development

The CalSTRS Cross-functional Approach

Presented by:

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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 CalSTRS Competency Library
- Identified Leadership Competencies by level



Competency Bridging – cont'd.

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



CalSTRS Strategic Plan

Annual Business Plan

Workforce
Plan

Succession
Plan



**EMPLOYEE
PERFORMANCE**

Planning work,
setting expectations

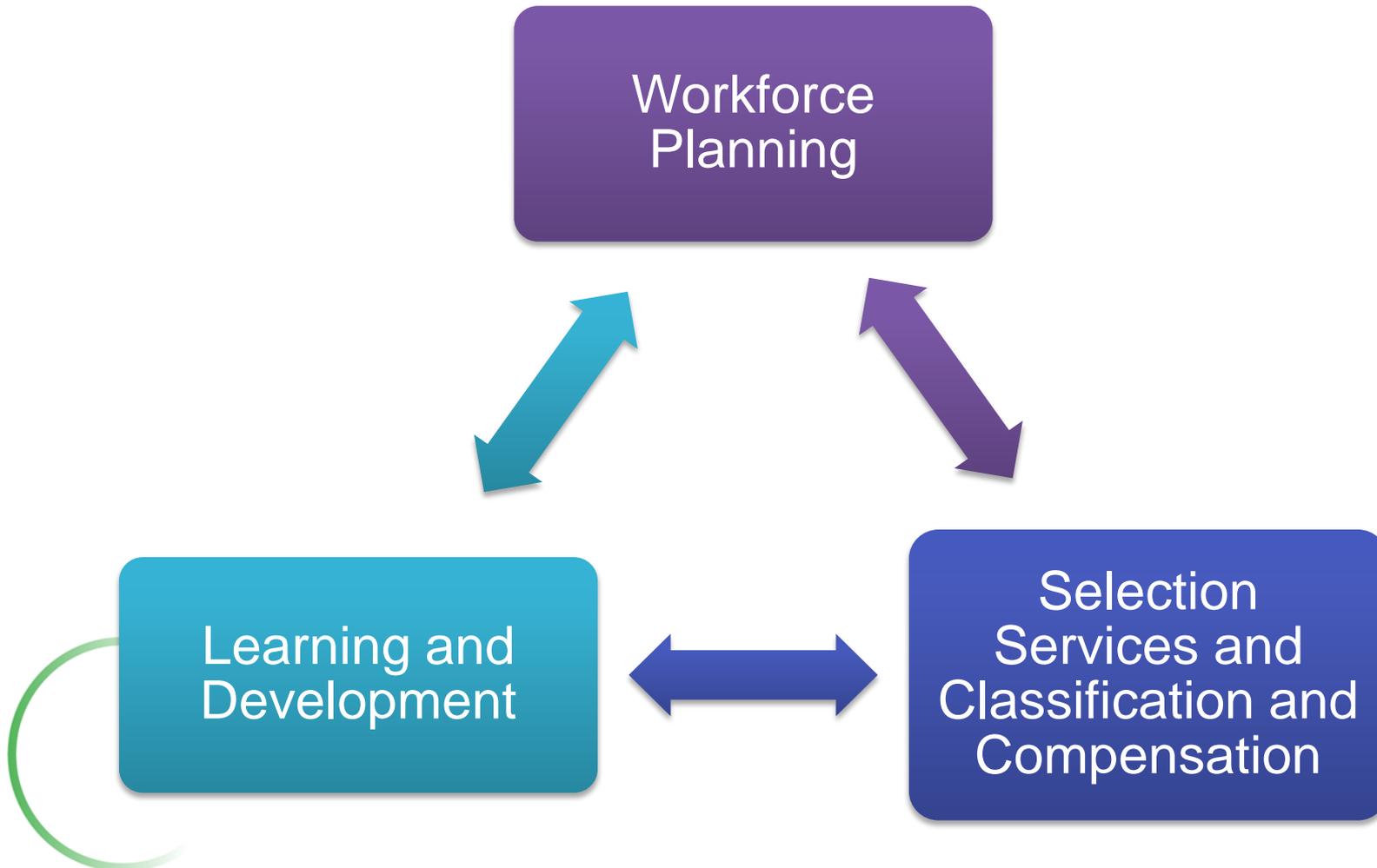
Observing
individual
performance

Developing the
capacity
to perform

Evaluating
performance

Recognizing
successful
performance

Competency Development Cycle



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.

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