

# Notes from the Quarterly Workforce Planning Professionals Meeting - October 9, 2014

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## Announcements

### CalHR's goals for fiscal year

- Major focus on diversified recruitment and annual increase in veteran hires
- Our recruitment activities include hire-a-vet events and lunchtime seminars including every 2<sup>nd</sup> Tuesday at SPB for general public and every 4<sup>th</sup> Tuesday at CalVet for veterans
- January knowledge transfer and succession planning workshops to come
- We will publish items related to knowledge transfer including onboarding materials prior to workshops

## We are here to help

Our unit can assist your department with facilitation, one-on-one help, and data analysis for workforce planning

## Updates on class consolidation and class specification revisions

There are now around 3400 classifications

There are 300 classes going before the State Personnel Board soon

CEA delegation rollout has taken schedule time

We will re schedule the meeting with Personnel Management to answer questions from workforce planning professionals

## Recruitment events

See our Statewide Recruitment website for upcoming recruitment events

CalHR is willing to represent and/or partner with your department at career fairs, and will bring your materials with us if you are unable to go to the event

## Information about the Workforce Planning Process

### Timeline for Workforce Planning

- Set the strategic direction—align human resources to strategic plan goals and objectives

- Gather and analyze workforce data and perform gap analysis
- Develop the workforce plan
  - Prioritize by the largest gaps
  - Develop strategies to address the gaps
  - Develop the plan
- Implement the plan
  - Create an action plan to carry out the plan's strategies
- Evaluate the plan
  - Continually evaluate the plan to ensure it is relevant and addressing the gaps

## Starting up workforce planning efforts

Establish executive support

Assemble a formal steering committee with members from various division/program areas department wide

Create a project plan—keeps you organized and timely

## Needs assessment

Competency gap analysis—determine Knowledge, Skills, and Abilities needed now and in the future for each classification

Compare with what currently exists to determine what is missing (gap)

Use the following items to identify the knowledge, skills, and abilities required for the classification:

- Duty statement
- Class specifications
- Job analysis

Manager's role is to provide input regarding critical competencies needed by each classification they oversee, and assess their employees' competence level on a classification-wide basis

Employee's role is to participate in competency assessment through a competency self-evaluation

## Achieve buy-in

Show how workforce planning aligns to the department's strategic mission and goals, business needs, and division/program area needs

Executives are concerned about accomplishing the department's strategic goals and ensuring budgetary resources are being properly allocated to accomplish those goals

Share data analysis to justify the need for workforce planning and show how it will target the personnel budget to the areas of greatest need

## Metrics and Data Analysis

Attrition = Retirement because major loss of knowledge when people retire

Personnel committee member key to getting the workforce data you need to analyze for workforce plan

Employee History Report on our sample MIRS report

May wish to request Employee Leave Balance when preparing for upcoming retirements, especially as people will use 6 to 8 months of leave time before they officially retire. Must prepare for them to be gone for those months

Managers can provide information about transfers through organizational charts updates that note date and type of separation on the chart, should be provided to the workforce planning team when updated; also important to consistently capture exit interview data about what drew them to the new department

Our unit is going to roll out the Recruitment and Retention Program as soon as possible; executive team is reviewing the materials. We will be announcing it as soon as possible. The Recruitment and Retention Program is the first ever attempt to gather statewide trends on employee separations. We will let the executive team know that departments are interested and requesting the program. We understand that departments don't want to create one for their department if they are able to use ours as a larger entity to provide an anonymous survey which is more likely to get useful results.

## Knowledge Transfer

Hot topic; capturing knowledge is part of retention and succession planning

Tacit knowledge: soft skills, experiential knowledge – culture of department, relationship building, promotion

Explicit knowledge: concrete and procedural knowledge

Coaching should be part of an employee's career while they are working for you; turn things like IDPs into coaching moments to guide and support employee's development

Variety of opportunities for professional development to reach all types of learners and audiences (webinars, classroom, etc.)

Capture processes and procedures continually in manuals to ensure consistency across the work functions and ensure the knowledge is available for new employees

Directory of SMEs so employees know who to go to as well as presentations by each division in an "open house" format to learn about what each program area does and when things change in the department

Onboarding is more than orientation, keeps employee engaged and assimilated to the department; helps them stay in the organization and be more productive

State Hospitals: Resources (checklist for each time period, etc.) and workshops for hiring managers to show that it is the hiring manager's responsibility to provide ongoing support to new employees, available online; hiring managers take ownership for getting the employee oriented to their particular area, not just the training officer's responsibility to make sure the employee has the initial training they need

Barriers to knowledge transfer: Training someone is time-consuming, prevents engagement because we don't feel we have the time; our expertise makes us valuable, may not want to give up the information because it will somehow make you less valuable

However, your workload is high and you feel you never able to take a vacation or give attention to additional projects

Knowledge transfer allows you to have a back-up person to assist you with workload; also educate others about the processes you do so they have more realistic expectations about the timeframe for your product; don't worry about asking for knowledge and training in return

## **Workforce Planning Survey Results**

Based on 26 responses

Outdated strategic plan? Still pull relevant pieces from old plan, ask division chiefs about their goals, environment scan, and SWOT

Might be an area for us to provide guidance on selling workforce planning to executive team to get support

We do not wish workforce planning to be mandated; would rather have it be a voluntary process so that departments take ownership and see value of workforce planning for the department

Hands on workshop on data analysis may be needed to help departments and more information about workforce planning

## **Open Discussion**

### **Developing and Achieving Buy-In for a Cross-Training Program**

- Develop solid cross training plan and train on tools developed. Build time into training session for them to work on plan on the spot. Create and active workshop.
- One challenging mindset—leaders who do not see the responsibility as theirs because they are getting close to retirement.
- Clearly illustrate the benefit for them to establish buy-in.
  - Avoid being understaffed
  - Build moral

- Building 'resume' to increase your own value through developing additional knowledge, skills, abilities
- Career diversity
- Most cost-effective professional development
- Meet business needs
- Expose employees to other opportunities to increase career satisfaction, retention, and productivity
- Start with a core group to illustrate value and communicate wins/successes
  - Seek division/program area with strongest buy-in
  - Identify critical classifications
- Work with managers to identify their critical areas, and help establish strong training pairings