Developing a Workforce Plan: Setting the Foundation

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Objectives

• Identify Recruitment, Retention, Succession Planning Strategies
• Develop the workforce plan
• Implement and evaluate the plan
• Workforce Plan examples
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**

**Current Supply**
- Headcount and Competencies

**Future Supply**
- Headcount and Competencies
  - Retirements and Separations

**Future Gap**
- Headcount Gap
  - Difference between the number of employees remaining in the current workforce after retirements and separations have been taken into account (future supply) and the number of employees needed in the future based on business needs (future demand)

**Current Gap**
- Headcount Gap
  - Difference between current supply and current demand headcounts
- Competency Gap
  - Difference between current supply and current demand in skill, knowledge, and ability

**Current Demand**
- Headcount and Competencies

**Future Demand**
- Headcount and Competencies
  - Business Drivers
  - Competencies that retired and separated employees take with them
  - Competencies needed in the future based on business needs
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 (i.e.: 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 1\textsuperscript{st} year
• Integrates multiple functions/individuals
• Addresses all new employee needs over long-term period
• Employee participation is active
• Aims to increase likelihood of 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
  – Maintain employee recognition program
Implement the Plan

• Follow the Action Plan Benchmarks and Communication Plan you have developed for each initiative
Evaluate the Workforce Plan

Download the Workforce Planning Evaluation Assessment Tool