



Change Management Forums Survey Report

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Overview

As a part of the state’s Civil Service Improvement (CSI) initiative, CalHR Selection Division has implemented the Change Management Forums (CMF) to communicate current processes and future changes that will impact the State of California’s Selection Process. The CMFs’ purpose was to inform state agencies and departments of upcoming changes, the impact of these changes, and how these changes will be managed internally and externally. Additionally, the CMFs included a Question and Answer (Q&A) portion providing opportunity for immediate feedback by attendees.

Scope

This document provides an overview of the responses captured in a post CMF survey of attendees. The CMFs provided communication regarding upcoming service improvements and deliverables from CalHR’s Selection Division.

The CMF was presented three times in sessions spanning two separate days. A total of 198 were in attendance, representing 74 departments (Attachment A). A live broadcast of the final CMF hosted an additional 87 online viewers. The archived broadcast¹ has been viewed by 44 for a total of 329 individuals receiving the CMF presentation.

Date	Session	Attendees
February 15, 2017	One – 1:30PM	72
February 28, 2017	Two – 9:30AM	70
February 28, 2017	Three -- 1:30PM	56
February 28, 2017	Live Broadcast	87
	Archived Broadcast	44
	Total	329

Upon conclusion of all CMFs, an electronic survey was sent to all attendees to capture feedback. The survey was extended to all departments through various communication methods as outlined in the Communication Matrix (Attachment B). Included in the matrix is in person announcements to the Human Resources (HR) community at various forums and electronic communication. The survey’s primary focus for feedback was on the Selections Division’s five deliverables presented:

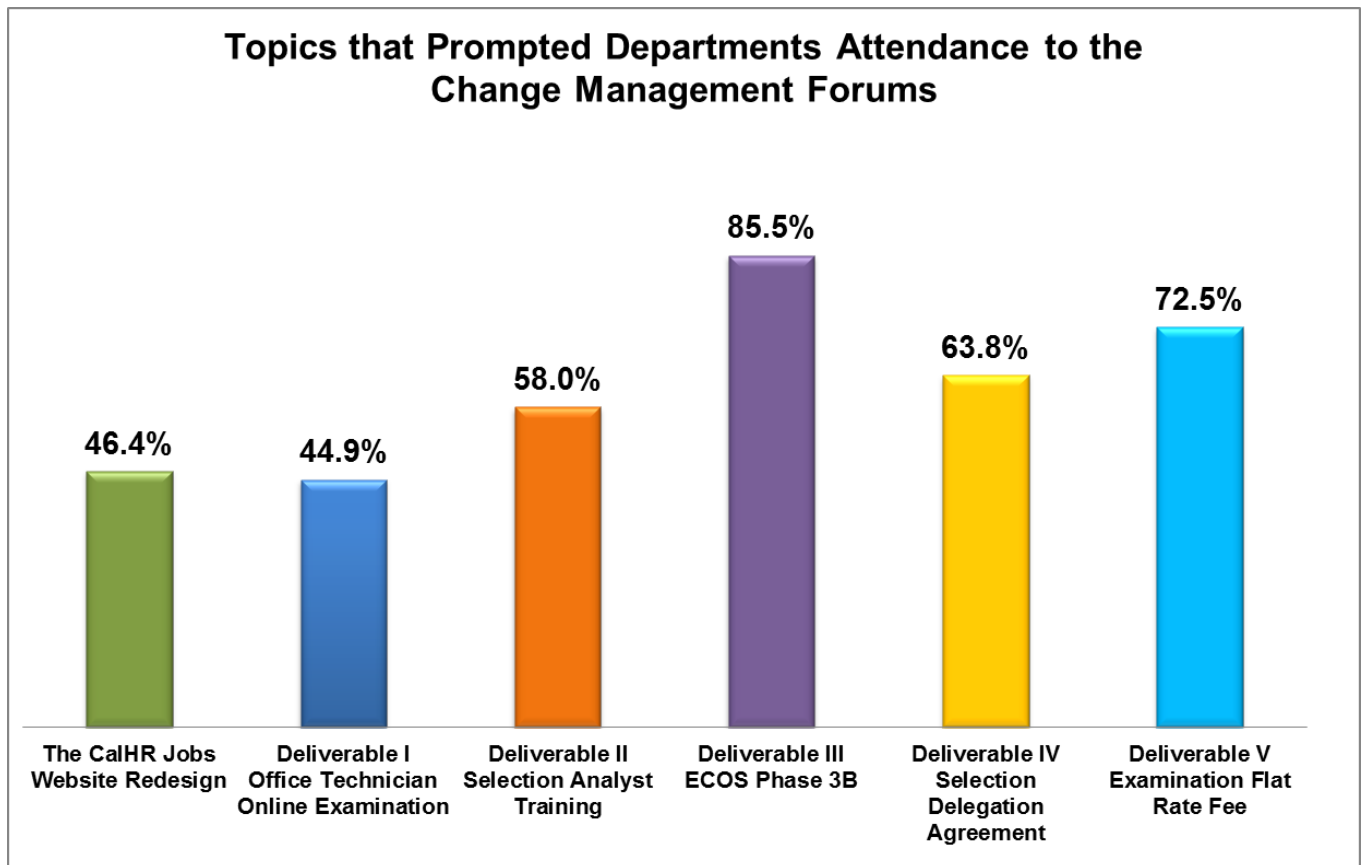
- Deliverable I: Office Technician Online Examination**
- Deliverable II: Selection Analyst Training Cohort**
- Deliverable III: Examination and Certification Online System (ECOS) Phase 3B**
- Deliverable IV: Selection Delegation Agreement**
- Deliverable V: Exam Flat Rate Fee**

¹ Numbers are current as of April 12, 2017 at 9:03 AM..

The survey produced feedback from a total of 69 individuals representing 22 departments (Attachment C) this is 1.5 percent of total attendees and viewers. Due to the option for anonymous feedback, 47 survey participants choose not to identify the department.

Summary of Results

The survey results identified the top three topics of interest prompting attendance to be ECOS Phase 3B, Exam Flat Rate Fee, and Selection Delegation Agreement.



Deliverable I: Office Technician Online Examination

Overview of Changes

CalHR developed the online Office Technician (OT) Examination that is now available in a non-proctored environment, 24 hours a day and seven days a week. This change was necessary due to the high demand of this examination and the multiple complaints received from public during administration of the examination. The examination was released February 9, 2017. As of June 19, 2017, 15,290 individuals have taken the examination with 8,285 successfully achieving list eligibility. Positive feedback regarding the online OT examination has been received from the HR community and the public. Further, numerous requests to utilize this examination methodology for other classifications have been made.

Summary of Results

The majority of survey respondents believe the examination is important to their department and the change will greatly improve their hiring processes. A notable concern was expressed regarding over exposure of examination material and the potential of cheating. CalHR identified these issues early on as potential risks and to mitigate this problem candidates are required to self-certify and accept the official terms and conditions which include an assertion that the candidate is taking the examination alone. Additionally, CalHR forecast an estimated cost savings of approximately \$100,000 per year in staff time, material reproduction, travel, and shipping costs.

Next Steps

CalHR will monitor the examination over the next six months to one year to evaluate the activity and develop lessons learned. This will assist in determining best practices for duplicating this testing methodology for future exams. Based on the survey results, CalHR will be developing confirmation assessment tools to assist departments in addressing the concerns regarding upholding the integrity of the examination process. Additionally, CalHR will explore establishing an item bank as a resource for refreshing future examination materials.

Deliverable II: Selection Analyst Training Cohort

Overview of Changes

CalHR has designed a project driven training cohort for selection professionals. This training model will help facilitate learning the required competencies for selection professionals. The current a-la-carte training model takes a minimum of 24 months to complete due to the dependency upon the availability of courses. The new training cohort will allow participants to complete training within six months.

Summary of Results

The Selection Analyst Training Cohort Pilot (Cohort-Pilot) received positive responses from the HR community. The majority of participants indicated they would enroll themselves and/or their staff upon implementation. Survey respondents from the following departments indicated the desire to participate in the Cohort-Pilot:

- Department of Child Support Services
- Department of Motor Vehicles
- Office of Environmental Health Hazard Assessment
- Office of Legislative Counsel
- Public Employment Relations Board
- State Compensation Insurance Fund

Next Steps

To provide our stakeholders with the best training products, CalHR hired a Retired Annuitant (RA) with expertise in curriculum development and training delivery, specifically for implementing the Selection Analyst Training Cohort. CalHR will be launching a marketing campaign in May 2017 for admission to the Cohort-Pilot. Departments who expressed interest in participating in the Cohort-Pilot will be given priority registration access in June 2017. The Cohort-Pilot is on schedule to begin July 2017.

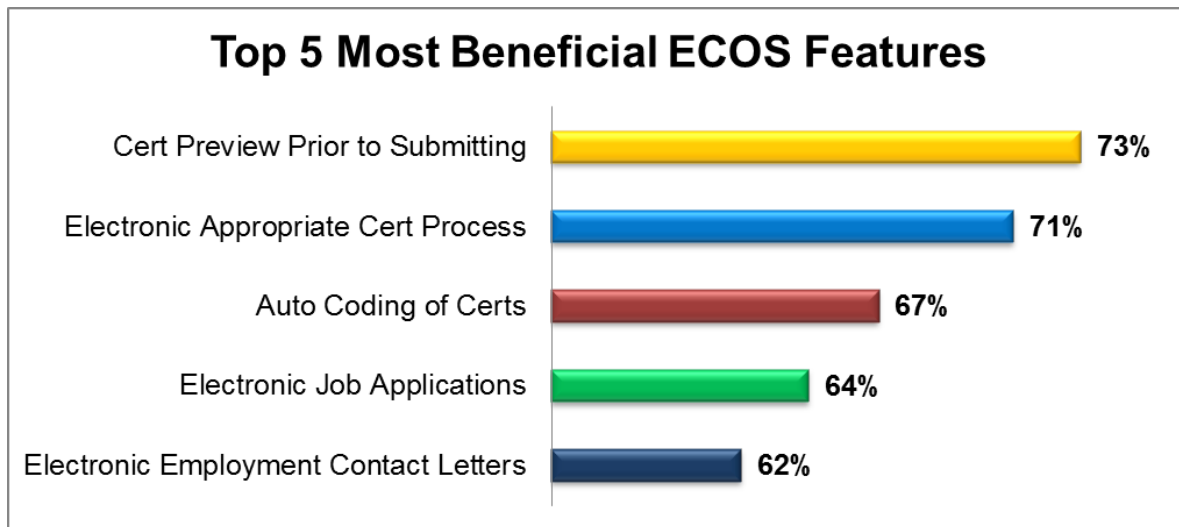
Deliverable III: ECOS Phase 3B

Overview of Changes

The implementation of ECOS Phase 3A in January 2016 provided electronic functionality to streamline the hiring process. The upcoming implementation of Phase 3B (Examinations and Reporting) will introduce real time processing for all selection functions in one system. The release of Phase 3B is scheduled for June 2017.

Summary of the Results

In the survey, participants were asked to identify the ECOS feature(s) most beneficial to their departments. Out of the 14 ECOS features identified, below are the top five features reported as the most beneficial to the departments:



In addition, the proposed rollout methodology of departments transitioning in phases versus departments accessing the system all at once was received positively by 96 percent of participants. Concerns related to training of staff and possible software bugs in the future release were expressed. Overall, departments expressed excitement over the upcoming release.

Next Steps

The ECOS Team has developed an implementation project plan to effectively transition departments to ECOS Phase 3B. The data collected from readiness surveys will be utilized to determine which departments are prepared for transition. User Acceptance Testing will be utilized twofold as a system refinement and user familiarization.

Deliverable IV: Selection Delegation Agreement

Overview of Changes

The Selection Delegation Agreements are designed to reinforce, educate, and support state departments in their roles and responsibilities to operate a selection program. The agreement outlines the terms and compliance requirements necessary to properly administer a selection program.

Summary of Results

The survey respondents were asked if they agreed with the proposed implementation of the Selection Delegation Agreement and 54 percent of the responses were positive to neutral with the implementation.

Next Steps

The Selection Division has presented the Selection Delegation Agreement to a widespread Executive and HR audience, the feedback provided was used to make modifications to the Delegation Agreement. The Selection Division will move forward distributing the Delegation Agreement to Departmental Directors. The projected launch is July 2017.

Deliverable V: Exam Flat Rate Fee

Overview of Changes

The existing consortium examination pricing methodology is costly and inefficient and has received numerous complaints from departments regarding cost inequity.

The proposed solution will reduce long-term cost to departments as well as address the concerns identified in CSI initiative 1.5 (Multi-departmental Examinations) for CalHR to modify the funding model from a fee-for-service to an annual fee-based approach. The original proposed costing methodology is illustrated below with the suggested cost breakdown by department size. This proposed cost tier pricing was presented at the CMFs. Departments were informed there would be an overall 23% savings in cost with the new methodology and 39% of departments will have an annual savings with this proposed costing methodology.

Department Size	# of Employees	Proposed Annual Fee
Mega	7,000 +	\$65,000
Large	2,000-6,999	\$40,000
Medium	501-1,999	\$25,000
Small	76-500	\$12,500
Micro	51-75	\$2,500
Nano	0 - 50	\$1,000

Summary of Results

The existing fee-for-service structure was firmly recognized as too costly by 74 percent surveyed departments. Survey respondents were asked if the implementation of an annual Exam Flat Rate Fee would be beneficial to their department and 87 percent of the responses received were positive to neutral with this service improvement. A few of the respondents questioned why departments need to pay for examinations at all, and whether an adjustment can be made to the proposed annual fee to mitigate the cost their departments previously accrued through the one time registration fees.

The challenging part of this proposed annual flat rate fee are those departments that purchased several consortium examinations in the previous fiscal years and were not planning on purchasing any new examinations for the upcoming fiscal year, anticipating to only pay for the low monthly maintenance fees for their existing exams. Furthermore, Department of Finance (DOF) reviewed the analysis of this proposed costing methodology and expressed concerns of the flat fee being too high for the middle tier

departments. Therefore, as a result of the DOF and departments' feedback, some of the pricing tiers (Large, Medium and Small) were adjusted. The new proposed cost tier pricing shown below would now result an overall 51 percent savings in cost with the new methodology and 49 percent of departments will have an annual savings.

Department Size	# of Employees	Proposed Annual Fee
Mega	7,000 +	\$65,000
Large	2,000-6,999	\$35,000
Medium	501-1,999	\$18,500
Small	76-500	\$8,500
Micro	51-75	\$2,500
Nano	0 - 50	\$1,000

Below are some of the benefits listed as a result of this new pricing model resulting in more of a win than a loss:

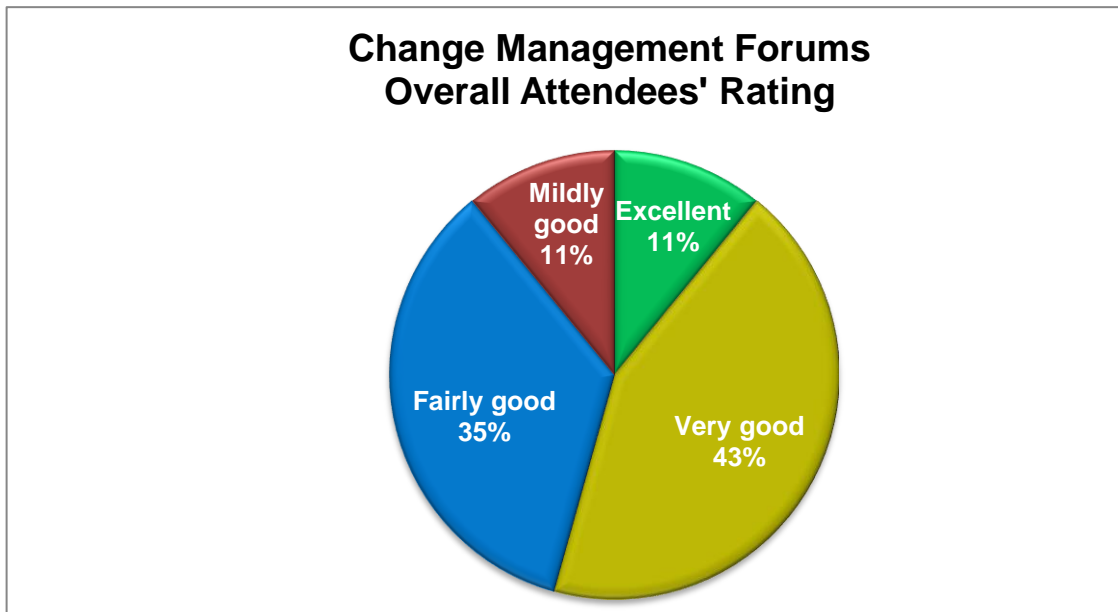
- Addresses the inequity of examination cost based on department size;
- Provides departments access to all servicewide and consortiums exams at no additional cost as well as all newly developed class consolidation exams;
- Expedites the hiring process by providing departments access to all lists;
- Eliminates consortium examination access fees;
- Eliminates monthly consortium maintenance fees;
- Reduces CalHR staff processing time;
- Reduces department escalations and improves overall customer service; and
- Allows CalHR to focus on developing quality selection products and assessment tools to meet the needs of departments.

Next Steps

After reviewing the benefits of implementing the proposed costing methodology, the Selection Division recommends moving forward with the updated proposed Annual Exam Flat Rate Fee. By majority, the original proposed pricing methodology was well received; however, the Selection Support and Training Team has revisited the bottom line numbers and found the updated Annual Flat Rate Fee to be more cost effective for all departments. The target implementation date is July 2017. At that point, all departments will have full access to existing and new servicewide and consortium examinations.

Change Management Forums Conclusion

CalHR's CMFs were well received and reported as beneficial. The majority rated the CMF from very good to excellent as illustrated below:



The CMFs allowed CalHR to communicate the changes and upcoming service improvement deliverables that impact to departments' selection program. Most importantly, it provided an opportunity for department feedback prior to implementation. Our team revised deliverables in accordance with the feedback received. In review of the effort to communicate changes, increase attendance, and attain department feedback the Selection Division will move forward to implement each deliverable. The Selection Division's Selection Support and Training Team will continue to track and monitor success of deliverables, requesting feedback from stakeholders and lessons learned. The team will continue utilizing project management concepts and lean methodology to eliminate wastes, increase effectiveness, and provide excellent customer service to our stakeholders.

Attachment A

CMF Attendance by Departments

22nd/Del Mar Fairgrounds
Air Resources Board
Board of Equalization
Business, Consumer Services and Housing Agency
California Conservation Corps
California Correctional Health Care Services
California Department of Forestry and Fire Protection
California Earthquake Authority
California Energy Commission
California Health Benefit Exchange
California High-Speed Rail Authority
California Highway Patrol
California Housing Finance Agency
* California Lottery
California Military Department
California Public Employees' Retirement System
California Public Utilities Commission
California State Teachers' Retirement System
California State Transportation Agency
* California Tahoe Conservancy
California Victims Compensation Board
Commission on Peace Officer Standards and Training
Community College Board of Governors
Department of Aging
Department of Alcoholic Beverage Control
* Department of Business Oversight
Department of Child Support Services
Department of Conservation
* Department of Consumer Affairs
Department of Corrections and Rehabilitation
Department of Developmental Services
Department of Education
Department of Fair Employment and Housing
* Department of Finance
* Department of Fish and Wildlife
Department of Food and Agriculture
Department of General Services
Department of Health Care Services
Department of Housing and Community Development
Department of Industrial Relations
Department of Insurance
* Department of Justice
* Department of Motor Vehicles
Department of Parks and Recreation

Department of Pesticide Regulation
Department of Public Health
Department of Rehabilitation
Department of Resources Recycling and Recovery
Department of Social Services
Department of State Hospitals
Department of Toxic Substances Control
Department of Transportation
Department of Veteran Affairs
Department of Water Resources
Employment Development Department
Franchise Tax Board
Government Operations Agency
Governor's Office of Emergency Services
* Office of Environmental Health Hazard Assessment
* Office of Legislative Counsel
Office of Statewide Health Planning and Development
Office of Systems Integration
Office of the Inspector General
Prison Industry Authority
* Public Employment Relations Board
Sacramento-San Joaquin Delta Conservancy
Secretary of State
* State Compensation Insurance Fund
* State Controller's Office
State Council on Developmental Disabilities
State Lands Commission
State Personnel Board
State Public Defender
State Treasurer's Office

*Indicate Departments identified as survey participants

Attachment B Communication Matrix

Item	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Date
Government Operations Agency	Provide briefing on 2017 CalHR Selection Division Changes	Meeting	Twice	Sec. Marybel Batjer	Deputy Director Division Chief Project Manager	LEAN Project results/Change Mgmt Comm Plan	10/16/16 & 1/11/17
Classification Supervisor's Forum (CSF)	Remind Exam Community of Forums & Feedback Survey	Meeting	Twice	Certification Meeting	Division Chief	Discussion	1/10/2017 & 3/15/2017
Online HR Manual Distribution	Announce Forums to HR Community	Distribution List	Once	HR Community	Change Management Team	CalHR Announcement	2/09/17
Governor's Office	Provide briefing on 2017 CalHR Selection Division Changes	Meeting	Once	Julie Lee	Deputy Director Division Chief Project Manager	Change Mgmt Comm Plan	2/10/17
Exams Supervisors' Forum	Remind Exam Community of Forums & Feedback Survey	Meeting	Twice	Exam Managers	Division Chief	Discussion	2/13/2017 & 3/13/17
Change Management Forums	Provide overview on 2017 CalHR Selection Division Changes	Presentation	Three	Admin Officers Exam Managers Personnel Managers	Change Management Team	Handouts Webcast -2/28 only	2/15/17 & 2/28/17
HR AdHoc Committee	Remind HR Community of Forums	Meeting	Once	Personnel Managers	Division Chief	Handouts	2/23/17
Department of Finance	Discuss budget impact of Flat Rate Fee	Meeting	Once	Eric Stern	Division Chief Project Manager	PowerPoint Handouts	3/03/17
Survey	Obtain Feedback after Forums	Survey Monkey link	Twice	HR Community	Change Management Team	Online Survey	3/03/2017 & 3/08/2017 Due 3/10/2017

Attachment C

Departments - Participated in the Survey

- Board of Equalization
- California Energy Commission
- California Lottery
- * California Tahoe Conservancy
- * Department of Business Oversight
- Department of Child Support Services
- Department of Conservation
- Department of Consumer Affairs
- Department of Finance
- * Department of Fish and Wildlife
- Department of Justice
- Department of Motor Vehicles
- Department of Public Health
- Department of State Hospitals
- Department of Veterans Affairs
- Department of Water Resources
- Office of Environmental Health Hazard Assessment
- Office of Legislative Counsel
- * Public Employment Relations Board
- State Compensation Insurance Fund
- State Controller's Office
- State Public Defender

*Indicate Departments without a physical presence in the CMF.