

August 2026 Statewide HR Policy Forum:

CalLearns Training Information
System
Workforce Plan Collection
Process
New Hiring Guide
Pooled Hiring

August 2026



Welcome!

Nita Patel, Chief of Staff, CalHR



Housekeeping

Wi-Fi – Connect to the CalHR Guest

Restrooms – Near the Elevators

Forum length – 3 hours

Today's Agenda

- Overview of 2026 Policy Forum Topics
- May 2026 Forum Highlights
- Presentation: CalLearns Training Information System (CTIS)
- Presentation: Workforce Plan Collection Process
- Break
- Presentation: New Hiring Guide
- Presentation: Pooled Hiring
- Wrap Up and Close Out

Overview of 2026 Policy Forum Topics



**Mar. 10 – 12,
2026**

**“Performance Management” and the
“Bargaining Process”**



**May 12 – 14,
2026**

**Career Executive Assignments, Minimum
Qualifications and Salary Determination**



**Aug. 18 – 20,
2026**

**CalLearns Training Information System (CTIS)
Workforce Plan Collection Process
New Hiring Guide
Pooled Hiring**

Your Feedback, We took Action

- Mass Downloads of Applications in ECOS
- Extending the Policy Forums to 3 hours
- Increased communication at all levels
 - [Interested in subscribing to While You Were Working Newsletter](#)
 - [Interested in subscribing to other CalHR Subscriptions](#)
 - [CalHR](#)
- Quicker response times to policy related questions – implementation of the Request Tracking System (RTS)

Department Feedback from the last forum

Majority of attendees find the HR Policy Forums helpful and very valuable

Majority of attendees enjoy the engagement with other Departments to learn and share

60% of May Forum attendees felt they learned information to share with their teams

CalLearns Training Information System (CTIS)

Brent Seavers

*CalLearns Administrator
Learning and Development*

Akemi Okamoto

*LMS Specialist
Learning and Development*

CTIS Learning Outcomes

CTIS Learner Outcomes

- Recognize the purpose and benefits of CTIS.
- Understand the statewide policy requirements and reporting expectations outlined in HR Manual Section 2802.
- Identify key department readiness activities to prepare for CTIS implementation.
- Locate CTIS resources and support available to assist with onboarding and reporting.

Agenda

- Setting the Stage
- What is CTIS?
- Why CTIS?
- Policy & Reporting Requirements
- Department Readiness: What Departments Need to Know
- Implementation Timeline
- Resources & Next Steps
- Questions & Discussion

Setting the Stage

CalLearns Training Information System (CTIS)

- One Statewide Workforce, Separate Training Records
- Why Statewide Training Data Matters
- Enterprise HR Connects the Pieces
- Extending Statewide Benefits to All Departments
- Enter CTIS

What is CTIS? (1 of 3)

What It Is

- CalHR's statewide system for collecting, managing, and reporting employee training data.

Who It Serves

- California state departments
- HR professionals
- Training administrators
- Workforce leaders

What is CTIS? (2 of 3)

Purpose

- Create a centralized statewide training record using the employee's Unique Employee Identifier (UEID).
- Support consistent training data reporting, workforce planning, and informed learning and development decisions.

What is CTIS? (3 of 3)

CalLearns	vs	CTIS
Learning Management System (LMS)		Database System
Employees register for and complete training		Departments submit completed training records
Delivers and manages learning		Collects and reports training data
Supports day-to-day learning activities		Supports statewide reporting and workforce planning

Why CTIS? (1 of 2)

Current State

Training records are maintained in multiple systems (e.g., dept LMS, homegrown system, spreadsheets).

No standardized statewide process exists to ensure an employee's completed training history follows them when they transfer between departments.

Departments use varying methods to obtain and verify prior training history.

Training data is maintained independently by departments, limiting statewide visibility.

Why CTIS? (2 of 2)

Future State (CTIS)

Training data is centrally reported through CTIS using a standardized approach.

CTIS provides a portable digital training record linked to each employee's UEID, giving departments visibility into completed training history when employees transfer.

CTIS provides a centralized record to help departments verify completed training.

CTIS provides a centralized statewide view of training data to support reporting, workforce planning, and informed learning and development decisions.

Policy & Reporting Requirements

Effective January 1, 2027- [2802 Statewide Training Data Reporting](#)

Departments that **do not** participate in EntHR-LMS VHSS are required to:

- Submit completed employee training records to CTIS on a quarterly basis.
- Submit training data to the system using the standardized reporting templates provided by CalHR.
- Continue to maintain their own LMS as the system of record.

Department Readiness (1 of 2)

What Departments Need to Know

Preparing for Onboarding

- Identify your CTIS implementation team and key stakeholders
- [Review CTIS website](#)
- Fill out [onboarding questionnaire](#) provided by CalHR (required)

During Onboarding

- Attend Live onboarding session (required)
- Review User Guide and FAQs
- Prepare learner and training records for sandbox environment and begin testing

Department Readiness (2 of 2)

Before Submitting to Live System

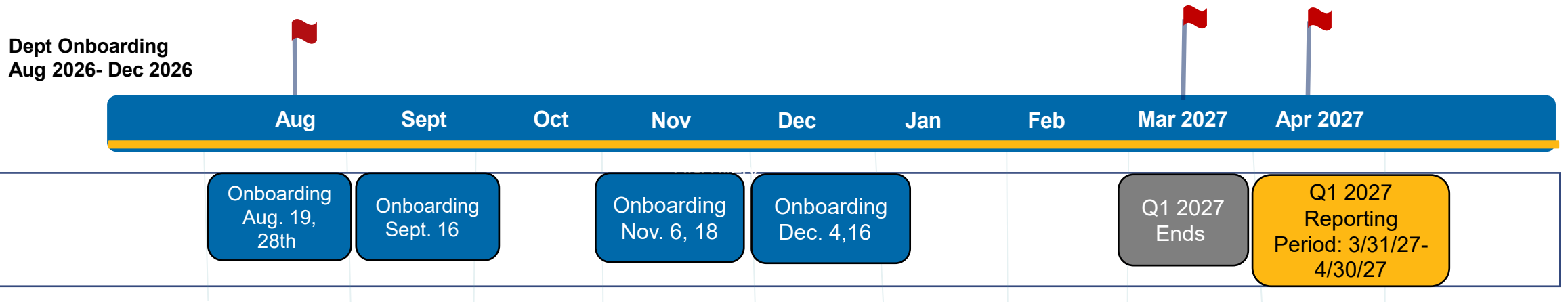
- Complete sandbox testing
- Receive approval to access live system
- Prepare for first quarterly submission

Reporting Schedule

Calendar Year (CY)	Data Period	Submission Due Date
CY Quarter 1	January 1 - March 31	Due April 30
CY Quarter 2	April 1 - June 30	Due July 31
CY Quarter 3	July 1 - September 30	Due October 31
CY Quarter 4	October 1 - December 31	Due January 31

Timeline

- **August–December 2026:** Attend department onboarding and complete sandbox testing.
- **After successful testing:** Receive approval to submit training records to the production environment (departments may begin submitting records before the first reporting period).
- **March 31 – April 30, 2027:** First official statewide reporting window for Q1 2027 training data.



Resources & Next Steps

- [CTIS Website](#)
- [User Guide](#)
- [Onboarding Registration & Dates](#)
- [FAQ](#)

CTIS Support: TrainingMailbox@calhr.ca.gov

Questions?

Workforce Plan Collection Process

Danielle Metzinger

Section Chief

Statewide Workforce Planning

Megan Shearer

Workforce Planning Manager

Statewide Workforce Planning

Workforce Plan Collection Process

Learning Outcomes



Recognize the strategic value of workforce planning and succession management for the organization and for the state overall.



Understand the purpose and requirements of the annual survey and collection process.



Identify what is new for the 2026 collection cycle.



Locate the Workforce and Succession Plan Status dashboard on the CalHR website.

Pulse Check – Who's in the Room?

By show of hands, who here is directly involved in Workforce Planning at their department?

Workforce Planning & Succession Management

Workforce Planning and Succession Management brings an organization's strategic plan to life by ensuring the right people are in the right jobs with the right skills at the right time.

Workforce Planning

- Improves an organization's ability to recruit, retain, and develop a diverse and skilled workforce through proactive planning
- Addresses workforce risks and challenges, aligns talent with goals, bridges skill gaps, and ensures readiness for future needs

Succession Management

- Supports workforce planning by establishing a strong bench of employees ready to compete for key positions in the organization
- Helps ensure leadership continuity, preserves critical knowledge, and supports professional development

Workforce and Succession Management Plan Survey and Plan Collection Overview

All state organizations with civil service employees are expected to respond every year

Annual opportunity for departments to share status of their workforce planning and succession management efforts

Enables CalHR to understand department needs and track and report on trends

Pulse Check – Department Status

By show of hands, who here knows the status of their department's workforce plan?

Survey and Plan Collection Process

CalHR announces via Memo to Directors



Organizations respond to survey questions and submit current plans to CalHR



CalHR tracks responses and provides feedback on plans

What's New for 2026?

Updated survey and plan collection period to be **September 1-30**.

Memos and instructions will be sent to Directors on **September 1** and will now be **tailored** based on your organization's 2025 status.

The CalHR Request Tracking System (**RTS**) will be used to collect survey responses and plans and to provide compliance results.

Results will be added to the new [Dashboard](#) on the CalHR website.

Which Form is Which?

No Plans in Place

Status Update to
Plans on File

Submit Workforce
and Succession
Management Plan

Using RTS for the Survey and Plan Collection

The specific Survey and Plan Collection RTS forms are only available September 1-30.

Memos we send to Directors will contain links to the RTS forms based on your organization's status.

Select the RTS form that is appropriate for your organization and fill out all the fields completely and accurately.

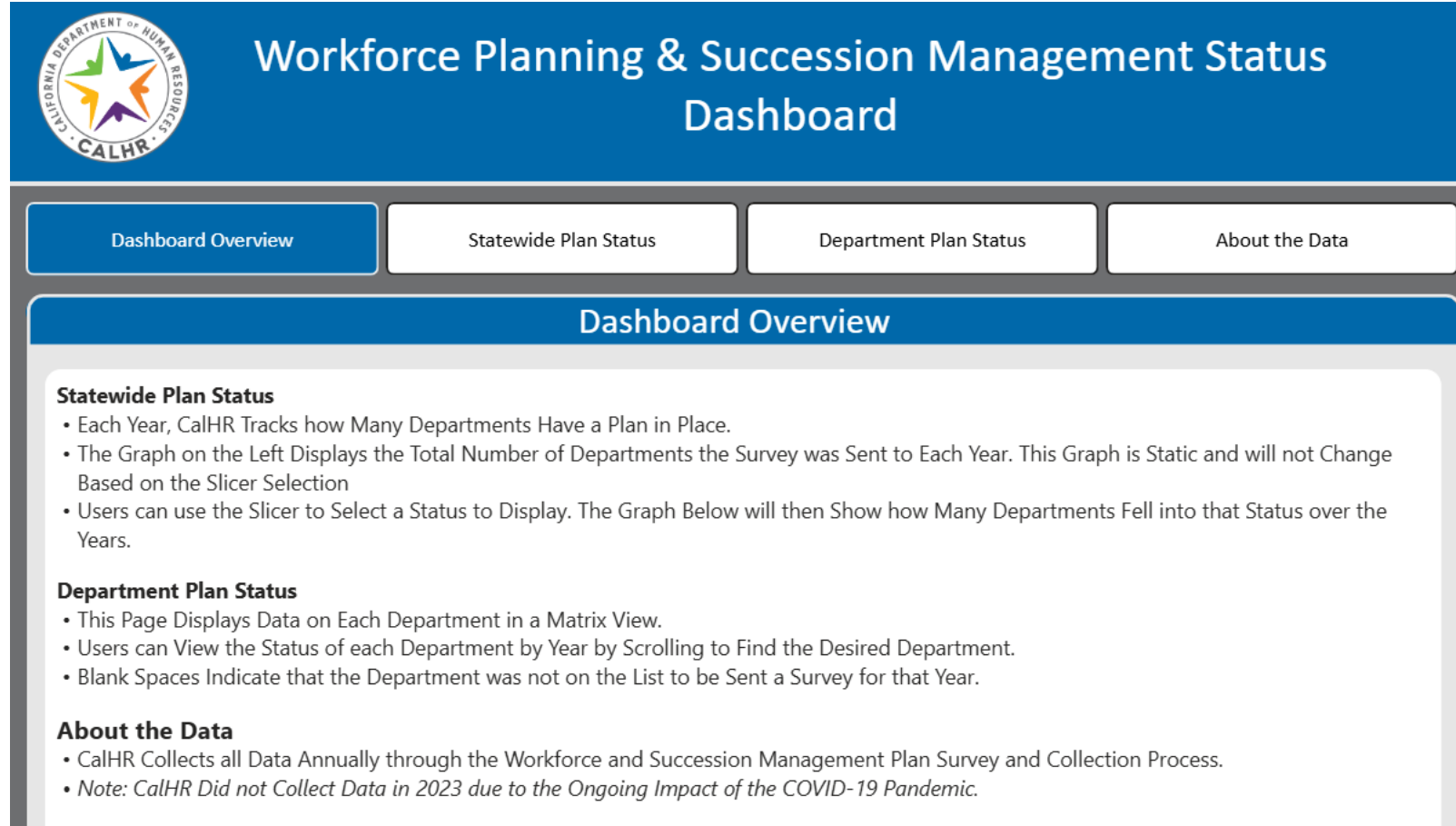
Refer to our Instructions document and the Statewide WFP team for additional guidance.

Pulse Check - Status Review

By show of hands, who here has looked up their department's workforce plan status on the CalHR website?

WFP/SM Status Dashboard

What we do with all this data?



The screenshot displays the 'Workforce Planning & Succession Management Status Dashboard' for the California Department of Human Resources (CALHR). The dashboard features a blue header with the CALHR logo and title. Below the header is a navigation bar with four tabs: 'Dashboard Overview' (selected), 'Statewide Plan Status', 'Department Plan Status', and 'About the Data'. The 'Dashboard Overview' section contains three informational blocks: 'Statewide Plan Status', 'Department Plan Status', and 'About the Data', each with a list of bullet points explaining the data collection and reporting process.

Workforce Planning & Succession Management Status Dashboard

Dashboard Overview

Statewide Plan Status

- Each Year, CalHR Tracks how Many Departments Have a Plan in Place.
- The Graph on the Left Displays the Total Number of Departments the Survey was Sent to Each Year. This Graph is Static and will not Change Based on the Slicer Selection
- Users can use the Slicer to Select a Status to Display. The Graph Below will then Show how Many Departments Fell into that Status over the Years.

Department Plan Status

- This Page Displays Data on Each Department in a Matrix View.
- Users can View the Status of each Department by Year by Scrolling to Find the Desired Department.
- Blank Spaces Indicate that the Department was not on the List to be Sent a Survey for that Year.

About the Data

- CalHR Collects all Data Annually through the Workforce and Succession Management Plan Survey and Collection Process.
- *Note: CalHR Did not Collect Data in 2023 due to the Ongoing Impact of the COVID-19 Pandemic.*

Pulse Check - Learning

By show of hands, who here has learned something new about Workforce Planning and Succession Management today?

Break

Accelerated Government Hiring: A New Guide for State HR Professionals & Hiring Managers

Sally Ly

*Deputy Secretary – Workforce Development
California Government Operations Agency*

New Hiring Guide: Learning Outcomes

- Understand the core elements of a fair, merit-based hiring process
- Use a fast, defensible application-screening method
- Conduct structured, flexible interviews
- Apply the Tiered Ranking Form to rank interviewees
- Apply appropriate reference-check practices
- Document a clear, concise “Best Fit” hiring justification

True or False:

A hiring decision is considered fair only if another manager would have selected the same candidate?

Which of the following determines whether a hiring process is merit-based?

- A. The chosen candidate matches the panel's favorite
- B. The process was consistent, transparent, and grounded in job-related criteria
- C. Everyone on the panel agreed on the same exact ranking
- D. The candidate had internal connections

Which statement best reflects the Hiring Guide's fairness standard?

- A. You must select the highest-scoring interviewee
- B. Personal knowledge can never be used
- C. Fairness = transparent, job-related evaluation regardless of who another manager might select
- D. Fairness = replicating outcomes across departments

What Merit-Based Hiring Is

- Merit is the foundation of CA's civil service system
- Commitment to hiring the best job applicants
- Evaluates all applicants based on job-related qualifications
- Transparent, competitive process
- Appointments made solely on merit and fitness

What Merit-Based Hiring Is Not

- A system that is overly bureaucratic, time-consuming and complex for hiring managers and job applicants
- Using screening and selection criteria that are not job-related
- Appointments made based on political affiliations, race, gender, or other protected characteristics

Selecting Which Applicants to Interview

1. Define and document the key job-related attributes, e.g., application screening criteria, Ideal Candidate Statement
2. Review all applications
3. Select which applicants to interview
4. Sort applications into 'Interview Yes,' 'Maybe,' and 'No' groups
5. HR conducts MQs review on 'Yes' candidates
6. Schedule interviews
7. Inform the 'No' candidates they have not been selected for an interview

Classification Examples

Classification: Research Data Analyst II
Department Name: Water Resources

- Relevant degrees or certifications
- Demonstrated excellence in education and/or career. Recognition within an organization through promotions, awards or additional responsibilities
- Experience leading complex research projects
- Proficiency in advanced statistical software (e.g., SAS) and Microsoft applications (e.g., Excel, PowerPoint, Power BI)
- Experience performing quantitative and qualitative data analysis
- Knowledge of water and climate issues
- Experience interpreting and applying state and federal laws

Classification: Research Data Analyst II
Department Name: Water Resources

The ideal candidate is a highly-skilled professional with a proven track record in leading complex research projects and managing high-level tasks. They will have a record of strong achievement in education and/or their professional career, showing recognition for strong performance through promotions, expanded responsibilities or other awards.

Proficiency in advanced statistical software, such as SAS, and Microsoft Office applications, including Excel, PowerPoint, and Power BI, is essential.

Strong analytical skills are paramount, encompassing the ability to perform both quantitative and qualitative data analysis. Expertise in water and climate issues, coupled with a thorough understanding of research methodologies, is highly desirable. Additionally, experience in interpreting and applying state and federal laws is necessary to ensure compliance and provide informed policy recommendations.

The ideal candidate will demonstrate technical proficiency, analytical acumen, and extensive knowledge in their field, thereby contributing significantly to the success of our organization.

Assessing Minimum Qualifications

- Go beyond merely matching key words
- Generally, only assess the MQs of applicants selected for an interview
- MQs may be screened after interview, although this may result in interviewing candidates who cannot be hired

Conducting & Assessing Interviews

- Questions must be job-related
- No fixed number of candidates must be interviewed
- Panel should consist of at least two members - the hiring manager and individual at same/higher classification
- Evaluation must be fair and non-discriminatory
- There is no single correct way to evaluate candidate interviews.

Step-by-Step Guide to Interviewing (1 of 2)

1. Consider the needs of the department
2. Develop open-ended questions based on context
3. Probe and clarify - the interview is not an exam
 - "Can you tell me more about that?"
 - "How did you handle that specific challenge?"
 - "What was the result of your action?"
4. Interview notes are for the interviewer's benefit
5. Evaluate how well interviewee fits the current needs

Step-by-Step Guide to Interviewing (2 of 2)

6. Discuss each interviewee's strengths and weaknesses
7. Rank each interviewee in order of preference
8. Final decision should be made by the hiring manager, taking into consideration the panel's input
9. Proceed to reference checks

Tiered Ranking Form

Tiered Ranking Form Example

Tiered Ranking Form

Classification & Working Title:

Department Filling Vacancy:

Instructions

After each interview, rank interviewees from most competitive to least competitive in descending order. The ranking is not an interviewee-to-interviewee comparison; rather, it reflects how well each interviewee aligns with the established screening criteria or Ideal Candidate Statement. You may not give any two interviewees the same rank.

Additional ranking is on the back of this sheet. Should you interview more than 15 candidates, please continue the tiered ranking system on a separate sheet of paper.

Interview								
Interviewee Rank	One	Two	Three	Four	Five	Six	Seven	Eight
	1	1	1	1	1	1	1	1
		2	2	2	2	2	2	2
			3	3	3	3	3	3
				4	4	4	4	4
					5	5	5	5
						6	6	6
							7	7
								8

The State of California is an Equal Opportunity employer committed to nondiscrimination on the basis of age, ancestry, color, physical or mental disability, gender, gender expression, gender identity, genetic information, marital status, medical condition, military and veteran status, national origin, race, religious creed, sex, or sexual orientation consistent with applicable federal and state laws. Reasonable accommodations will be provided for applicants with disabilities who self-disclose.

Common Interview Biases + Mitigation

- Confirmation bias
- Communication style bias
- Similarity bias
- Over-reliance on personal knowledge
- Halo/horn effect
- First-impression bias
- Stereotyping or protected-category bias

Conducting Reference Checks

- Past on-the-job performance is arguably the most important indicator of future success
- Checking OPFs for applicants with state service
- First-hand knowledge of an applicant's work can outweigh interview performance or written application materials
- Not limited to speaking with references provided by an applicant
- If reference checks influence a hiring decision, that should be noted in the hiring justification.

Final Selection & Justification

- The chosen individual does not necessarily have to be the highest-ranked interviewee
- Selection should be evaluated based on the totality of the information about the individual
- Document the reason for selection = brief memo

What "Best Fit" Means

- Alignment between the individual's job-related qualifications, behaviors, and demonstrated competencies and the needs of the role, team, and department
- Evaluated at the "point and time" in the recruitment
- Includes ability to contribute positively to the work environment through professionalism, communication, collaboration, and sound judgement

Hiring Justification Sample

Job Control: 443098

Classification: Research Data Analyst II
Department Name: Water Resources

Hiring Manager Name: Ruth Anderson

Justification Summary:

Lucia Rodriguez has been selected as Research Data Analyst II after a competitive process. Her job-related qualifications, interview performance, and alignment with the role's requirements were key factors. Lucia stood out above the other applicants. Lucia's experience as a policy fellow with the Delta Stewardship Council (2021-2023) and as a Research Data Analyst I with the Department of Water Resources (2023-present) are directly relevant to the environmental analysis required for this position. Her experience, interview, and reference checks all indicate that she is highly skilled in data management and knows how to use advanced statistical software. Her interview responses showed a strong understanding of the role and organizational values. Additionally, I think her experience and positive attitude will enrich our team dynamics. She received positive reviews from previous supervisors, and I have first-hand knowledge of her strong work ethic and knowledge of our subject matter.

Hiring Guide Checklist

- ✓ Create screening criteria or an Ideal Candidate Statement
- ✓ Review all applications and sort into three groups: 'Yes,' 'May,' 'No'
- ✓ Access MQs for individuals selected for interviews
- ✓ Conduct interviews
- ✓ Hiring panel discusses the merits of interviewees
- ✓ Hiring manager decides which, if any, individual to hire
- ✓ Check references, including OPFs if applicable
- ✓ Draft a brief hiring justification memo

Metrics & Pilot Departments

- 80-85 percent in time saved with screening alone
- This equates to between 538,650 and 570,000 of HR labor annually
- 15 pilot departments
- Final hiring guide incorporates feedback from pilot departments

Links to Hiring Guide and Exam Information



Search

[About CalHR](#) [State Employees](#) [State Supervisors & Managers](#) [State HR Professionals](#) [State Retirees](#) [Job Seekers](#)

Exams and Hiring

Selection Division

[Career Ambassador Program \(CAP\)](#)

[ECOS Plan / Phases](#)

[Exams and Hiring](#)

[Merit System Services Program](#)

[MSS Program History](#)

[← Back to Selection Division](#)

- [Accelerating Government Hiring: A Guide for Professionals & Hiring Managers](#)
- [Tiered Ranking Form](#)
- [Accelerating Government Hiring: Q&A Guide](#)
- [Behavioral Interview Guides](#)
- [Competencies](#)
- [Controlled Substances Abuse Testing](#)
- [Job Descriptions](#)
- [Supervisor's Responsibilities During the Probation Period](#)

For training and implementation support, contact:

Sally Ly

Sally.Ly@govops.ca.gov

(916) 202-2008

Q&A

Pooled Hiring

Chris Dainard

Chief

Selection Division

Pooled Hiring: Learning Outcomes

- Understanding Pooled Hiring Basics
- How to Implement Pooled Hiring
- Understanding Use Cases

Use Cases

- First pilot with CalHR included the California Department of Corrections and Rehabilitation, California Department of Public Health, and California Correctional Training and Rehabilitation Authority
 - Multiple permanent hires made
 - 75% efficiency attained in screening
- Second pilot through California Department of Tax and Fee Administration
 - 24 Student Assistant positions filled
 - Significant efficiencies realized

The Basics

- One Job Control with multiple, different vacancies
- Can be inter- or intra-departmental
- Shared Resources = Efficiency
 - More departments participating further increases efficiency
 - Communication and planning are critical
- Can be used with the new hiring guide!

Implementation

- Planning and preparation are critical
- Consistent process throughout
- Include anticipated dates on the job posting
- Include all duty statements
- Store all files for retention period
- Shared Resources = Efficiency

When to Use Pooled Hiring

- Multiple, similar positions
- Same tenure, time-base, and geographical location
- Able to prioritize the timeline across departments/divisions
- HR is willing to support

When Not to Use Pooled Hiring

- Vastly different positions/classifications/duties
- Changes in geographical locations
- Inability to agree on timelines
- Unwilling to prioritize the hiring
- Not able to fill multiple positions
- Disagreement on how to fill across departments/areas

Challenge to Departments

CalHR is looking for volunteer departments to demonstrate another few use cases to include in our portfolio of successful efficiencies for reporting to the Governor's Office.

If you're interested, please reach out to
Chris.Dainard@calhr.ca.gov

More Information

- [Executive Order N-25-30](#)
- [Press Release](#)
- [SacBee Article](#)

Please take a moment to
complete a short survey.

Your feedback fuels
improvement.

Thank You!

August 2026 CalHR Policy Forum
Attendee Survey



<https://forms.cloud.microsoft/g/B2BtwwLWwK>