

Integrating DEIA into workforce experience and planning



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Housekeeping

Please Silence Cell Phones

Resources Available After the Conference

Water/Refreshments

Think about the employee experience



What are we missing?

Vacancies



Turnover



Representation



Retirements



What is behind the numbers?

What else do we know?

What else do we know?

- Employee feedback
- Exit information
- Complaints and concerns
- Development and advancement
- Accommodation and access

Representation is only part of the picture

Representation tells us who is here.

What is their experience once they are here?

From information to action

What changes because of what we learned?

A process. A practice. A policy. A resource.

What does action actually look like?

What does action actually look like?

- Simplify a hiring process
- Change how opportunities are communicated
- Remove an unnecessary barrier
- Track what happens next

Workforce planning starts with the strategic plan

- Which positions and skills do we need to achieve our mission and strategic goals?
- What gaps exist between the workforce we have and the workforce we need to be successful?
- Gaps may include:
 - We can't fill the positions we need.
 - We're losing people we expected to keep.
 - Employees aren't moving into critical roles.
 - We may not have the skills we need next.

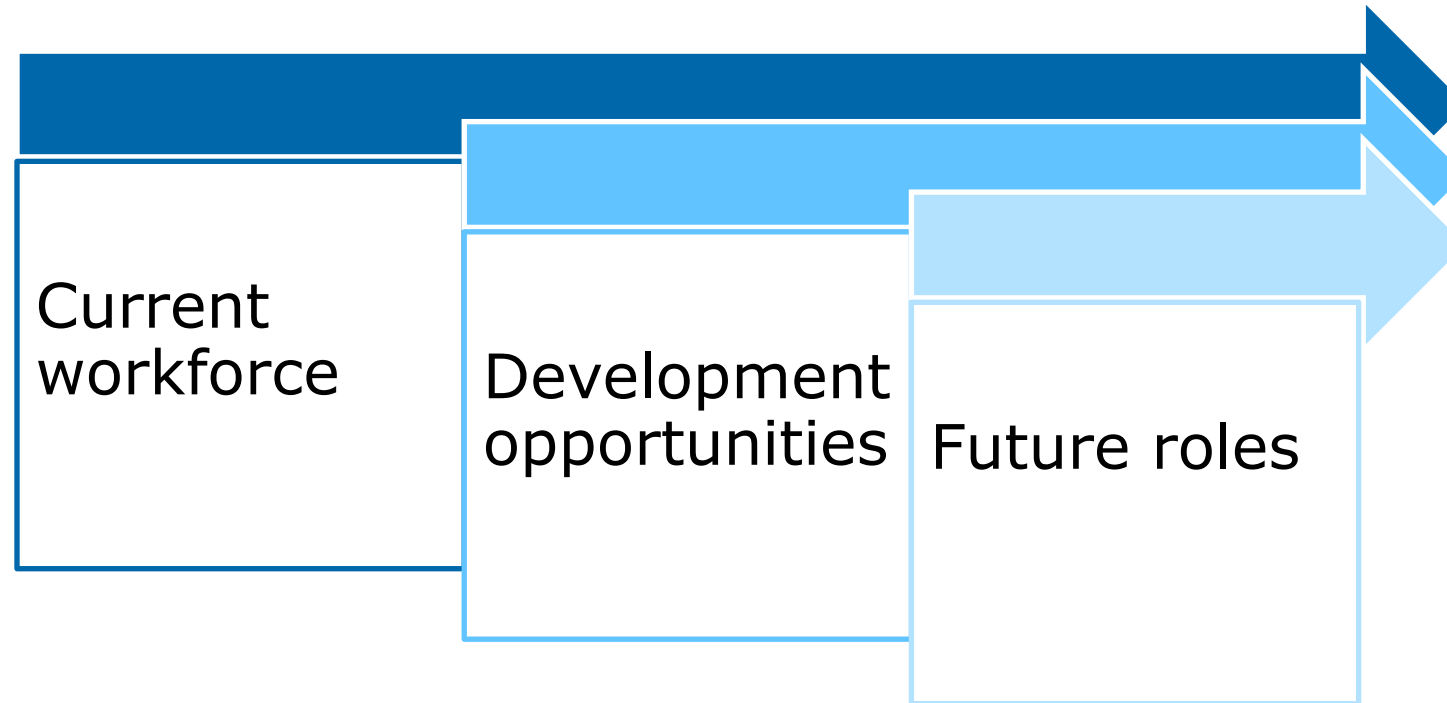
Diagnose before you prescribe

The same workforce challenge can have very different causes.

“We can't fill this classification.”

- Are enough people applying?
- Where are candidates leaving the process?
- Are we losing employees after we hire them?
- Are people developing into the classification internally?

Are we building the workforce we will need?



Who is moving forward, and where are people getting stuck?

Measure what happens next

- Participation tells us who showed up.
- Outcomes tell us what happened next.
- 50% of CalPERS Upward Mobility Program participants promoted during or after participation, 2021–2026

Plan for more than vacancies

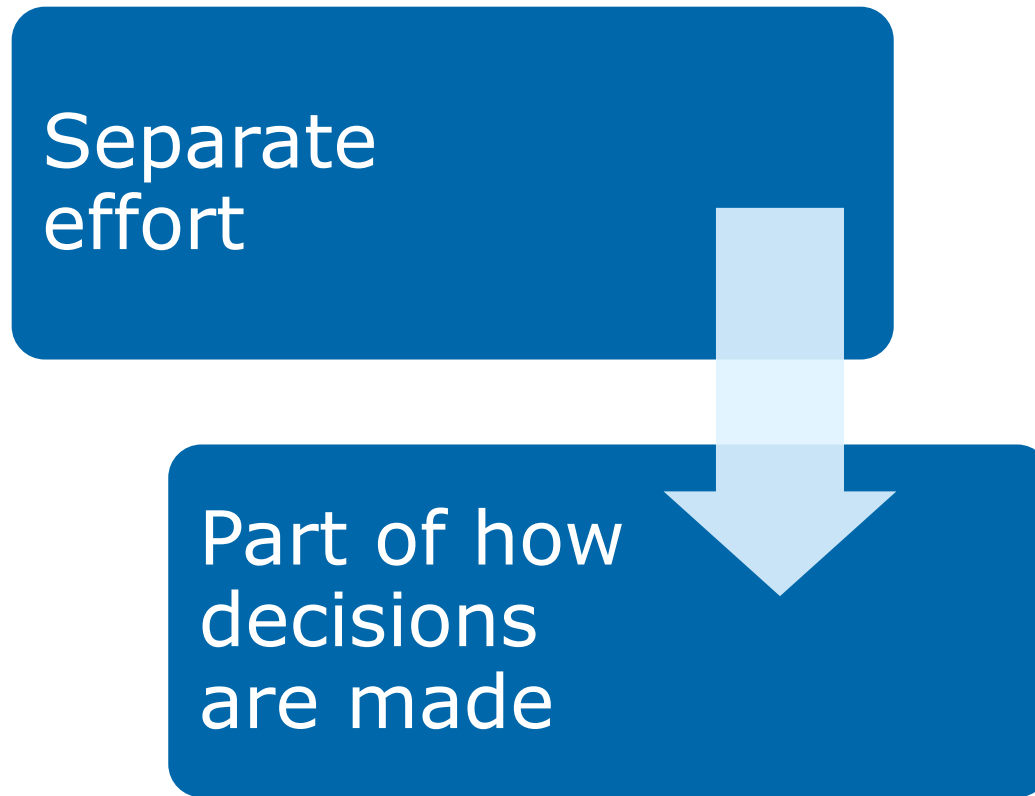
What could leave with the vacancy?

- Critical knowledge?
- A skill that is difficult to replace?
- A future leader?
- Capacity the organization depends on?

A vacancy count won't tell us that.

Make it part of how the organization works

Integration changes where the work happens.



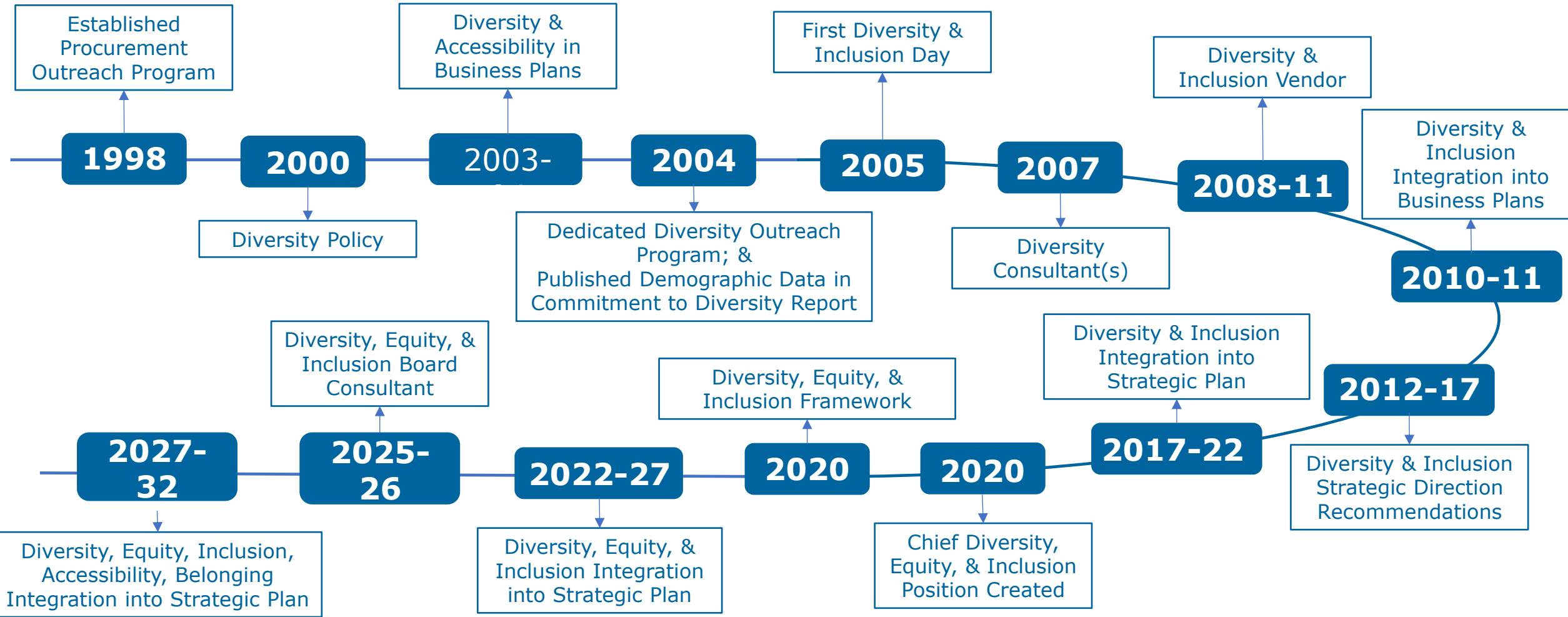
A Best Day at CalPERS



CalPERS Purpose

Deliver retirement and health care benefits
to members and their beneficiaries

Where We Have Been: CalPERS' Long Commitment to Purpose



Where We Have Been: The Evolution of CalPERS’ Framework



Culture

Goal: Bring Diversity, Equity, & Inclusion best practices into CalPERS’ culture

Objective: Increase awareness, build mutually rewarding relationships, & foster collaboration



Talent Management

Goal: A high performing, equitable, & diverse workforce

Objective: Ensure Human Resources processes are in place to strengthen diversity in recruitment, retention, equity, & succession.



Health Equity

Goal: Equitable health outcomes for members and their families

Objective: Ensure all health members have the opportunity to attain the highest level of health possible



Supplier Diversity

Goal: High performing supplier diversity program

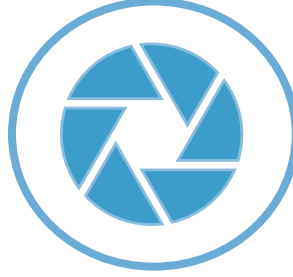
Objective: Better understand supplier community through the lens of diversity, equity, & inclusion



Investments

Goal: Leverage the Diversity, Equity, & Inclusion Framework and Sustainable Investments Program to improve investment outcomes

Objective: Deliver returns through the identification, analysis, & management of high-value sustainable investment risks and opportunities



Beyond the Pillars

Information Technology (IT) & Accessibility

Customer Experience

Stakeholder Engagement

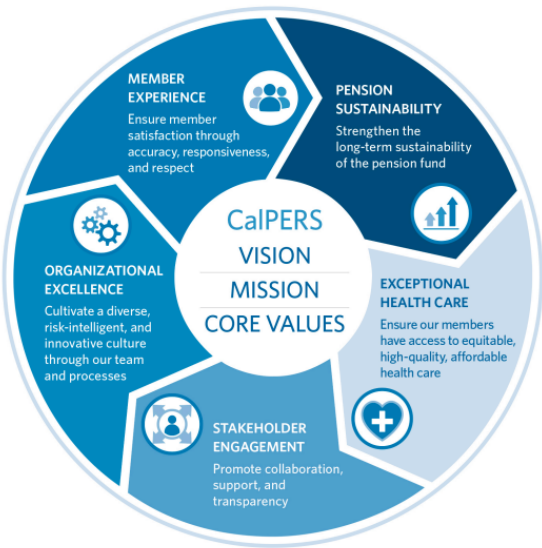
Where We Have Been: Strategic Integration

2012-17
Strategic Direction
Recommendations

2017-22
Strategic Plan

2022-27
Strategic Plan

2027-32
Strategic Plan



Where We Are: Talent & Culture



Talent & Culture: From Signals to Sustainable Access

CalPERS used workforce data and team member feedback to identify barriers, respond with targeted action, and build more visible pathways for connection, access, and growth



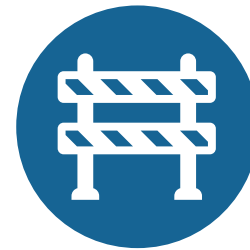
Understand the Workforce

Use representation, retention, vacancy, and sentiment data to identify signals



Listen Beneath the Numbers

Use team member and candidate feedback to understand needs and barriers



Remove Barriers to Access

Strengthen support for team members and expand access for candidates

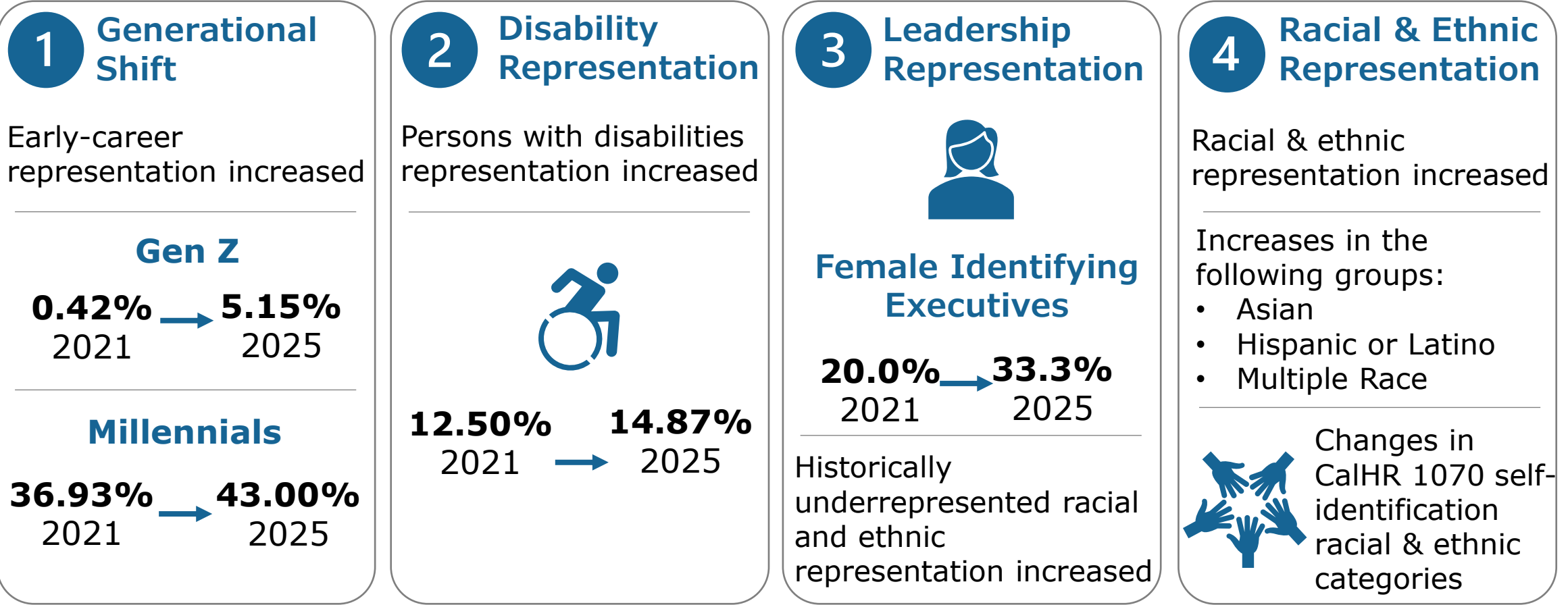


Build Sustainable Pathways

Connect mobility, accommodation, Talent Review, and workforce readiness

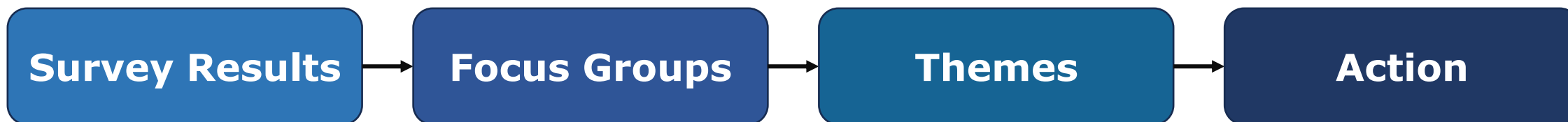
Talent & Culture: Understanding Our Workforce

Key shifts from 2021 to 2025 that inform outreach, retention, and development strategies

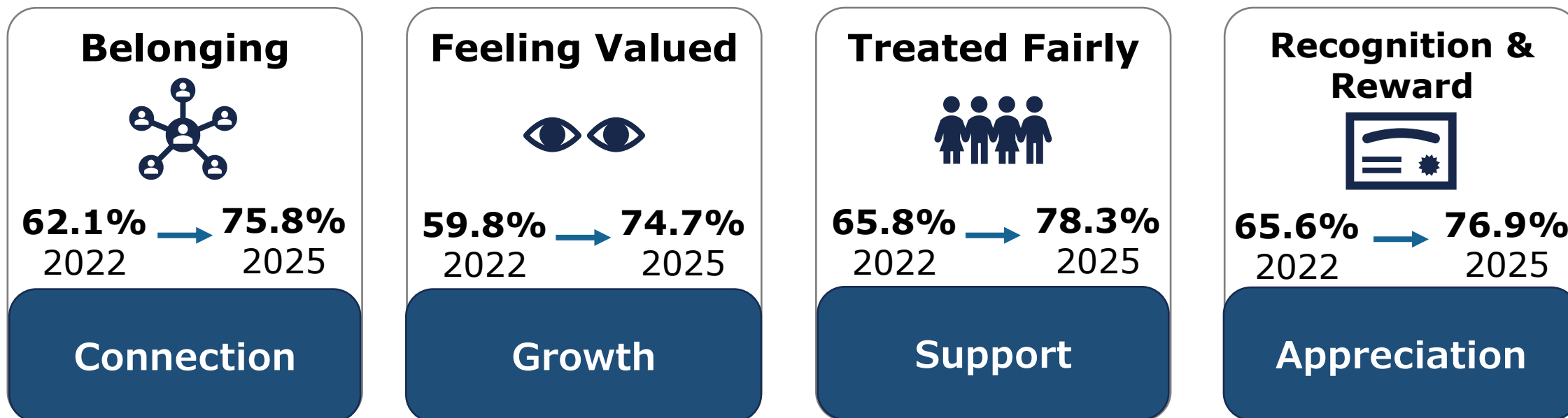


Talent & Culture: Listening Beneath the Numbers

Employee engagement survey results were a starting point for targeted response



2022 low points showed where deeper listening was needed



Talent & Culture: Building Belonging Through Connection

Together, these efforts create opportunities for connection, inclusion, and growth across the team member experience



Communities

- Disability Advisory Committee
- Diversity Inclusion Group
- Recognition Ambassadors
- Sustainability & Wellness Committees



Build connection



Shared Experiences

- Diversity & Inclusion Day
- Speaker events
- Cultural and community celebrations
- Accessibility awareness events
- Day of Giving



Create visible moments



Development Opportunities

- Leadership workshops
- New Employee Orientation
- Workplace readiness training
- Accessibility and inclusion learning
- Emerging Leaders Program



Strengthen inclusion

Talent & Culture: Showing Value by Encouraging Growth

Emerging Leader Program (ELP) expanded participation and connected leaders to enterprise priorities



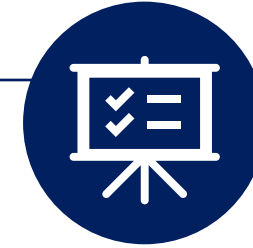
Expanded Access

- Investment Officer II classification
- People with supervisory experience



Inclusive Development

- Self-paced learning
- Leadership readiness workshops



Enterprise Projects

- DEI & Unconscious Bias
- Employee Engagement Survey



62% promotion rate over nine cohorts

Talent & Culture: Supporting Fair Access to Work

Medical management reduces barriers to team members can contribute and participate



Nick Kranz
APEX Recipient,
2026



Practical, Outside-the-Box Support

Mini fleet of mobility
scooters supports
~10 team members



Consistent IME Process

Effective
accommodations to
~15 team members



Strong Program Stewardship

Most recent RA audit
had 0 findings

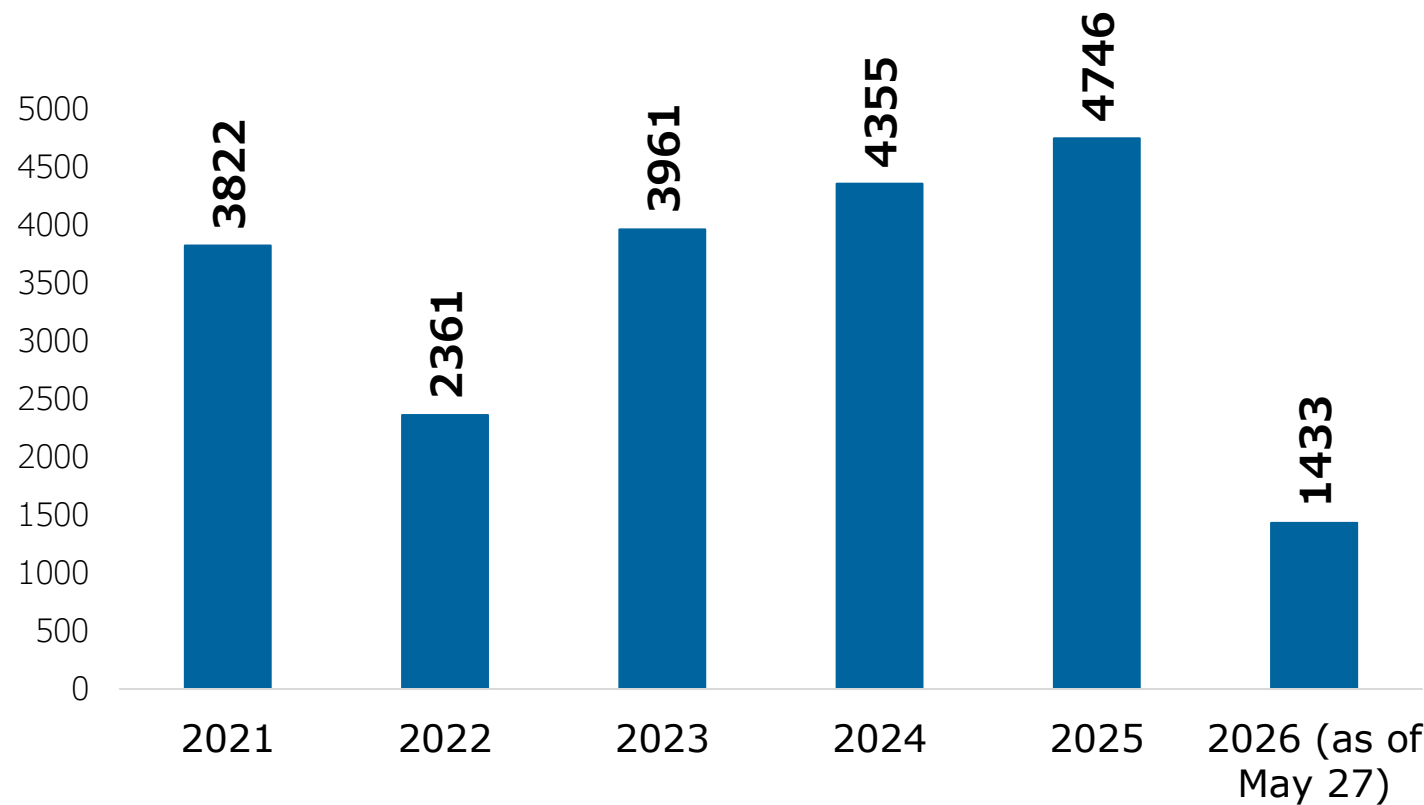
"Within a day, I went from having limited knowledge and information to being fully equipped to support the team member through a challenging situation"

- Nick's APEX nomination

Talent & Culture: Recognizing and Appreciating Our Team

Acts of Appreciation campaign kicked off in 2023 with expanded recognition activity

ACE & eSunsparK Awards



 **Actions Taken**

 Recognition Challenge

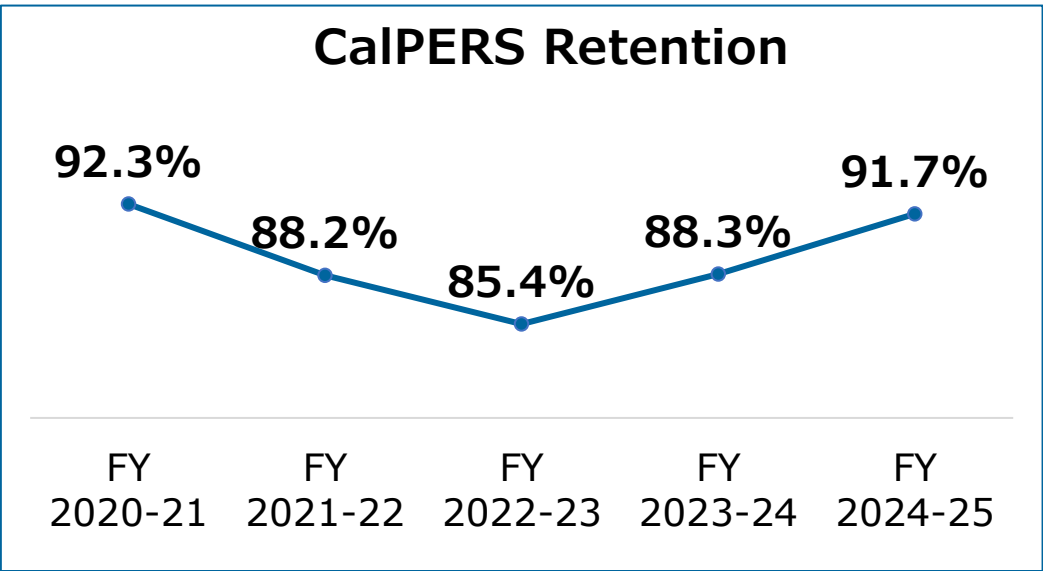
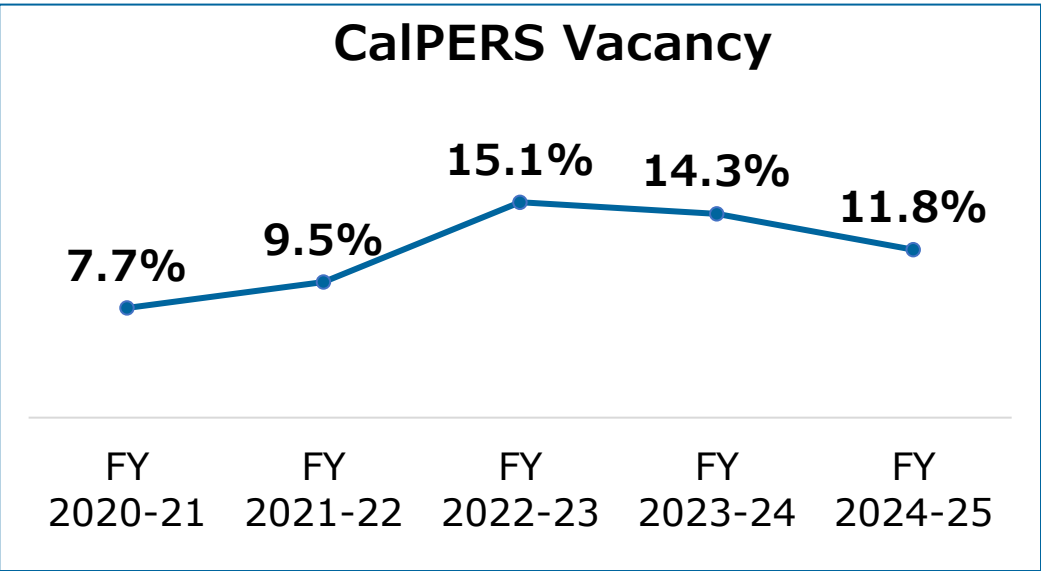
 Division Recognition Ambassadors

 Streamlined APEX nomination

Talent & Culture: Workforce Risk Prompted Barrier Removal

Retention and vacancy rates showed where CalPERS needed to respond

	2020-21	2021-22	2022-23	2023-24	2024-25	Comparison 2022-23 to 2024-25
Retention Rate	92.3%	88.2%	85.4%	88.3%	91.7%	+6.3 pp
Vacancy Rate	7.7%	9.5%	15.1%	14.3%	11.8%	-3.3 pp



All data representative of CalPERS authorized position population.
Data Sources: State Controller’s Office and CalPERS PeopleSoft HCM

Talent & Culture: Career Outreach Expanded Impact

Outreach and personalized support led to more diverse participation

2025 Direct Outreach Results

 **2,278**
Career Workshop Attendees

 **472**
Consultations Completed
since Fall 2025

 **11**
Successful Hires
into various classifications

Applicant Reach for 2025 Recruitment Campaign

 **+33%**
Average applicants per
recruitment

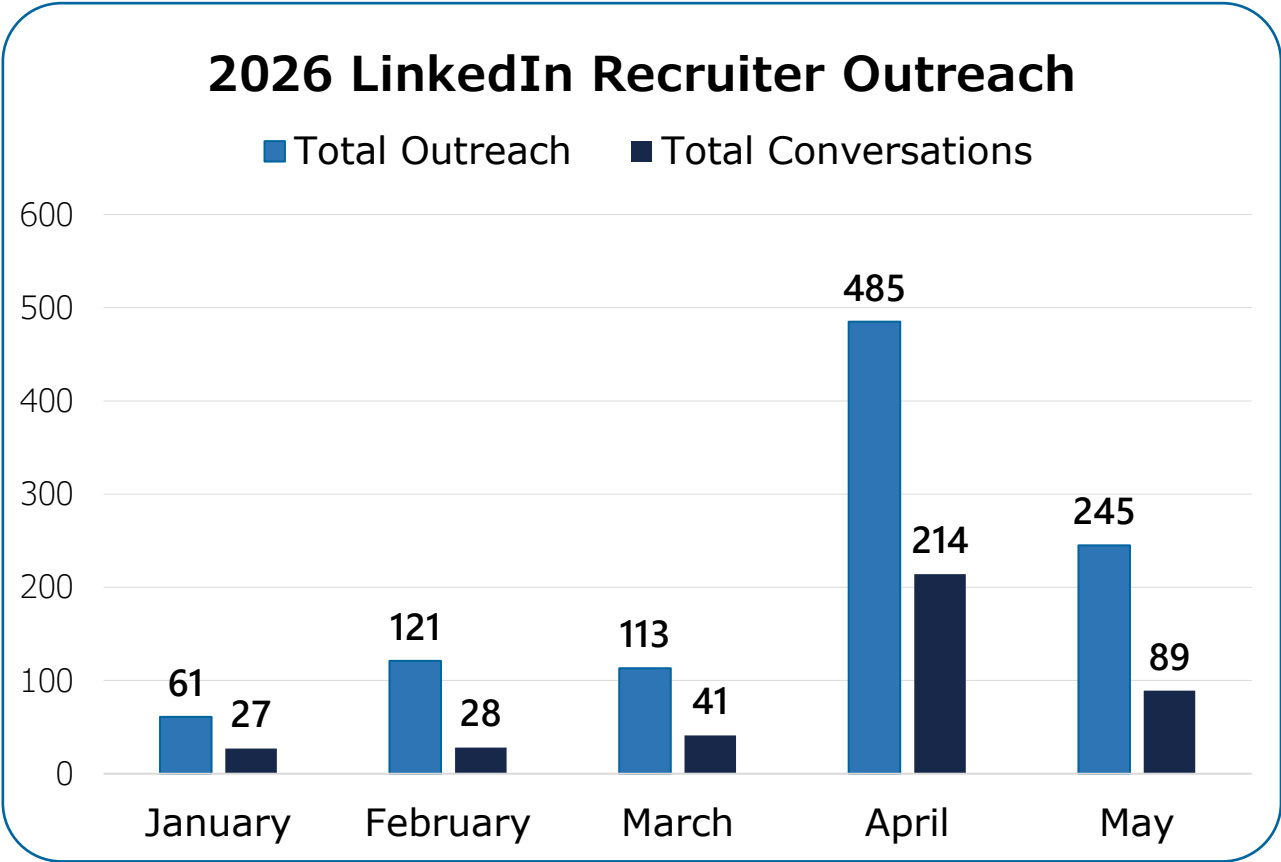
 **+38%**
Analyst I/II applicants
per recruitment

 **+47%**
Investment Officer (IO)
series applicants

 **+56%**
Female-identifying
applicants for
IO series positions

Talent & Culture: LinkedIn Outreach Expands Engagement

Direct recruitment helped CalPERS connect with more candidates



1,025
Total Outreach

399
Total Conversations

699
Interactions in April

Talent & Culture: Building Broad, Sustainable Talent Pathways



Together, these initiatives expand access across the talent lifecycle – from recruitment to early-career pathways, mobility, leadership development, and workforce readiness



RECRUITMENT

Anonymous Hiring

Strengthen fairness in candidate review



EARLY TALENT

Student Assistant Program

Build pathways into public service



MOBILITY

Upward Mobility Program

Broaden access to career growth



TALENT REVIEW

Leadership Pipeline Visibility

Connect interest, readiness, and development



STRATEGY

Future-Ready Workforce

Align diverse talent with future needs

Where We Are Going



Where We Are Going: The Pillars

Talent and Culture

- Broad, sustainable talent pathways
- Future ready workforce

Technology

- Website modernization
- Chatbot capabilities
- Plain language
- Expand outreach

Customer Service & Support

- Continue to remove barriers, identify opportunities, and expand access

Investments

- Scaling high conviction relationships
- Deeper integration into portfolio construction
- Expanding collaboration across asset classes
- Exec & leadership adoption

Health

- Financial accountability for addressing disparities
- Improved access to high quality primary care
- Members are more than numbers

Supplier Diversity

- Increase internal stakeholder buy-in
- Expand pool of potential suppliers
- Increase engagement with business partners

Where We Are Going: Expanding and Leveraging Inclusion, Belonging, Opportunity & Access

Initiatives

**The Inclusion
Planning Cycle**

Data Ecosystem

Enterprise Access(ibility) Strategy

Communities, Partnerships, & Experiences

CalPERS' 2024-25 Commitment to Diversity, Equity, & Inclusion Report



QR Code to View Report

**Building
Better
Together**

