WORKFORCE PLANNING

COMPETENCY MODELS & KNOWLEDGE TRANSFER

Strengthening Workforce Capability



Purpose of Competencies

Competency models help departments:

- Clarify expectations
- Identify strengths and gaps
- Align training and development
- Prepare staff for promotions and key roles
- Strengthen succession pipelines

Understanding Competency Gaps

Competency gaps occur when key staff or pipeline candidates lack the abilities needed for future roles. You must document where gaps exist and link them to targeted development strategies.

Policy Requirements

- Identification of a competency model
- Current & future competencies of key positions (succession plans)
- Pipeline competency gaps and strategies to close them

CalHR Competency Models

Core Competencies

- Collaboration
- Communication
- Customer Engagement
- Digital Fluency
- Diversity & Inclusion
- Innovative Mindset
- Interpersonal Skills
- Resilience

Leadership Competencies

- Business Acumen
- Inspirational Leadership
- Results-oriented
- Stewardship
- Talent Management
- Vision & Strategic Thinking

Knowledge Transfer Considerations



- Key person dependency
- Limited documentation of procedures
- Tacit knowledge not systematically captured
- Insufficient onboarding or training

Knowledge Transfer Strategies

- Mentorship & coaching
- Job shadowing
- Cross-training
- Documentation of processes
- Knowledge capture tools
- Stretch assignments

Competency & Knowledge Transfer Integration

A strong workforce and succession management plan connects these elements:

- Using competencies to define what knowledge must be transferred
- Using knowledge transfer to build competency readiness
- Mapping key position pipelines to competencies and training needed
- Ensuring pipelines address future requirements, not only current ones

Common Pitfalls

- **Listing competencies without explaining relevance**
- **Not specifying future competencies**
- **Assuming knowledge transfer "happens naturally"**
- **Ignoring tacit knowledge or undocumented processes**
- **Failing to match development activities to actual competencies**

Checklist

- **Competency model identified**
- **Current & future competencies for key positions identified**
- **Pipeline competency gaps identified**
- **Knowledge transfer risks included**
- **Strategies aligned with competency and succession needs**

Model Phase Links

Phase 2 - Succession Management Model - Identify Candidate Pool and Gaps