Quarterly Workforce Planning Professionals Meeting – October 9, 2014

Slide 1 – Facilitators

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CalHR's Statewide Workforce Planning and Recruitment Unit

Slide 2 - Agenda

Introductions

Announcements

CalHR Perspective

Departments Perspective

Open Discussion

Wrap-Up

Slide 3 – Announcements

CalHR's goals and strategies for the fiscal year

Services provided by Statewide Workforce Planning and Recruitment Unit

Updates on class consolidation and class specification revision

Upcoming recruitment events

Slide 4 – Timeline for Workforce Plan

1. Set the strategic direction

2. Gather and analyze workforce data

3. Develop the workforce plan

4. Implement strategies

5. Evaluate the plan

Slide 5 – Starting up Workforce Planning Efforts

Executive support

Assemble a Steering Committee

Create a project plan

Contact our unit for assistance

Slide 6 – Needs Assessments

Competency gap analysis

Manager's role

Employee's role

Slide 7 – Achieving Buy-In

Show how workforce planning aligns to the department's:

– Missions and goals

– Business needs

– Division/program area needs

Share data analysis to justify the need for workforce planning

Slide 8 – Metrics and Data Analysis

Data analytics

MIRS Report

Transfers

Slide 9 – Organizational Charts

Use organizational charts to show when an employee separated, including the date and type of separation

Slide 10 – Organizational Charts (Continued)

Use the organizational chart to replace the name of the separated employee with the name of the new employee including the date they were appointed to the position

Slide 11 – Knowledge Transfer

Explicit knowledge = concrete, procedural knowledge

Tacit knowledge = experiential, personal characteristics, development of cooperative partnerships

Both types combined create institutional knowledge

Examples of Tacit knowledge transfer are coaching, mentorship, and career development

Examples of explicit knowledge transfer include professional development, desk manuals, subject matter experts, open house workshops, and employee orientation

Cross-training, job shadowing, and onboarding involve both tacit and explicit knowledge transfer

Slide 12 – Onboarding at CalTech

Download the Onboarding Plan from the Department of Technology

Slide 13 – Informal Mentorship at CalPERS

Download the Informal Mentoring Toolkit from CalPERS

Slide 14 – Knowledge Transfer at Caltrans

Download the Knowledge Transfer Guidebook from Caltrans

Slide 15 – Benefits of Knowledge Transfer

Decreases stress

Mutually beneficial: gain from knowledge sharing

All of our ultimate goal is the same! – Support my department's missions and goals

Slide 16 – Workforce Planning Survey Results

Build workforce planning profile

Usefulness of tools and resources

Identify opportunities for development

Slide 17 – Phase

Is your workforce plan in beginning development, moderately developed, complete, implemented, or not established?

31% of respondents say the workforce plan is in beginning development, 27% say the workforce plan has not been established, 23% say the workforce plan is moderately developed, 11% say the workforce plan has been implemented, and 8 % say the workforce plan is complete

Slide 18 – Strategic Plan

How current is your strategic plan?

54% of respondents say the strategic plan is current, 19% say the strategic plan is more than 4 years old, 11% say the strategic plan is 2 years old, 8% say the strategic plan is 3 years old, and 8% say the strategic plan is 1 year old

Slide 19 – Executive Support

Do your workforce planning objectives have executive level support?

35% agree that executives support workforce planning, 34% strongly agree, and 31% do not know whether their executives support workforce planning

Slide 20 – Tools and Resources

How useful are the tools and resources from the Statewide Workforce Planning and Recruitment Unit?

The least utilized tool was the Classification Risk Assessment Flowchart; training sessions and materials were the most useful; the Statewide Recruitment website was the least useful

Slide 21 – Rank by Importance

What is most important to you? Knowledge Transfer, Succession Planning, Employee Retention, Recruitment, or Training & Development?

Respondents rated Knowledge Transfer as most important, Succession Planning second, Employee Retention third, Recruitment fourth, and Training & Development as least important

Slide 22 – Greatest Challenge

What has been your greatest challenge in workforce and succession planning?

19% of respondents say Lack of relevant data and/or systems is the greatest challenge, 19% say Lack of financial resources for initiatives, 15% say Lack of training/education about workforce planning, 15% say

recruitment difficulties, 12% say loss of qualified staff due to retirements, 8% say lack of executive/high level support, 8% say lack of strategic plan, and 4% say high employee turnover

Slide 23 – Fill Out Survey

Fill out the [Workforce Planning Survey](#) today

Slide 24 – Contact Information

Contact for workforce planning: Email: **wfp@calhr.ca.gov** Phone: **(916) 322-0742**

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