



California Department of Human Resources
Equity and Accessibility Management Services Division

Upward Mobility Program Guidelines

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UPWARD MOBILITY PROGRAM GUIDELINES

INTRODUCTION

The State of California's Upward Mobility (UM) program is a career mobility program designed to give state employees in Low-Paying Entry-Level (LPEL) classifications an opportunity to advance to Entry-Level Technical, Professional, and Administrative (ELTPA) classifications.

Upward Mobility is a partnership between an employee and the department, which contributes to a department's overall employment, succession, and workforce planning efforts.

Departments are advised to utilize the contents of this guide in the development and administration of an effective UM program for employees in LPEL classifications.

AUTHORITY

- Government Code (GC) section 19401 requires each state department to administer an effective UM program for employees in LPEL classifications.
- GC 19402 requires state departments to annually develop UM goals and timetables, including the number of employees in LPEL classifications expected to advance to ELTPA classifications. This data is reported to the California Department of Human Resources (CalHR) each year through the Annual Workforce Analysis.

UPWARD MOBILITY

Upward Mobility is the planned development and advancement of employees from LPEL classifications to ELTPA classifications within state departments. It is not, as commonly thought, the promotion of employees through the ranks, from working level classifications to supervisory and managerial classifications. A UM program assists employees in LPEL classifications in developing their skills and advancing to more challenging and higher paying career opportunities in state service. An effective UM program should be administered in collaboration with relevant departmental units that include, but are not limited to, Equal Employment Opportunity (EEO), Human Resources (HR), Training and Development, and Workforce and Succession Planning.

Upward Mobility is an important part of a department's overall employment program. It can:

- Aid in meeting a department's labor needs in jobs where recruitment is becoming increasingly competitive and difficult.
- Provide incentive and support to employees so they can successfully advance from lower paying classifications to higher paying jobs.
- Assist the department's efforts to achieve a diverse workforce.

Responsibility for Upward Mobility

A successful UM program requires commitment and involvement from all levels within an organization. Employees must be motivated to seek opportunities, prepare formal career development plans, and demonstrate willingness to commit to developing their knowledge, skills, and abilities to become competitive for appointment to ELTPA classifications. Upward Mobility program participants are not guaranteed a promotion but are provided with resources and guidance to help them promote.

Each department's director is ultimately responsible for the overall commitment to supporting the UM program. A department must establish an effective UM program for its employees in LPEL classifications. This includes developing and publishing training and job opportunities, establishing fair criteria for selecting employees to participate in UM program activities, and assisting UM program participants in their career development efforts. To help ensure an effective program, departments are required¹ to appoint a UM Program Coordinator to plan, coordinate, monitor, and report on departmental UM efforts.

Program Review and Evaluation

Departments may form a UM committee tasked with establishing and administering a UM program. The UM committee should be comprised of the individuals identified in the "Roles and Responsibilities" section of this guide. Departments establishing a UM program should develop a process which explains how employees apply and are approved to participate. The UM committee should consider broader program administration questions, such as:

- How can the department increase UM program participation?
- Is funding allocated to UM training?
- Is the department effectively marketing the UM program?
- Are supervisors and managers supportive of the program and promoting it to their LPEL employees?
- Is the UM committee (if applicable) regularly evaluating and updating the program?
- Does the committee approve each individual plan or delegate plan approval to the UM coordinator?
- What is the supervisor's role in employee upward mobility?

¹ 2 CCR 599.982

DESIGNING A DEPARTMENT UM PROGRAM

Upward Mobility Plan Elements

California Code of Regulations, Title 2 (2 CCR), Section 599.983 requires each department to develop and maintain a written UM plan to include:

Policy Statement

A policy statement should include the department's commitment to providing UM opportunities for its employees in LPEL classifications. Below is an example of a policy statement:

It is the policy of this department to provide equal employment opportunities and the appropriate career tools to facilitate upward movement for all qualified employees in Low-Paying Entry-Level (LPEL) classifications.

It is also this department's policy to provide information that will assist employees in achieving their individual career goals. No employee shall be guaranteed a promotion; but rather all interested employees in LPEL classifications shall be given equal consideration to participate in UM program efforts based on the criteria set forth in this policy and any UM plan.

This includes developing and setting goals and timetables that reflect the number of employees who are expected to promote from LPEL classifications to ELTPA classifications.

Program Components

GC 19401 requires departments to provide the following program components "to the greatest extent possible:"

Career Counseling

Departments can provide individual or group career counseling through different departmental employees, e.g., UM program coordinator, supervisors/managers, and employees in the ELTPA classifications who could serve as career models. Each UM program participant is required to have a career development plan.

Academic Counseling

Some positions may require academic certification, or a set of skills acquired through an academic or vocational institution. Various academic and vocational institutions provide counseling, which assists students in planning their educational curriculum to meet their career goals.

Training Opportunities

Offer training opportunities through the department's internal training providers, CalLearns, cooperative agreements with other departments, colleges/universities, or contractors that can provide relevant skills training for UM program participants.

Training and Development Assignment

Training and Development (T&D) assignments may be available, depending on the department's resources. A T&D assignment is the delegation of duties on a part-time or

full-time basis for the purpose of training to either broaden an employee's skills and abilities in their present occupation, prepare an employee for a career in a different occupational field, or improve an employee's advancement potential.

On-the-Job Training

On-the-job training (OJT) is an alternative to formal classroom training, including formal and informal training sessions at the work site.

Job Restructuring

Job restructuring includes the development of career ladders and lattices. This includes the establishment and use of bridging classifications. For example, a department with a Staff Services Analyst (SSA) position can downgrade that position to a Management Services Technician (bridging class to SSA) to assist with UM. Departments should work with their HR Office to make this determination and in identifying other opportunities to modify requirements where barriers exist.

Roles and Responsibilities

This section outlines the roles and responsibilities of UM participants and program facilitators.

Upward Mobility Program Participants

The UM program participants are primary responsible for their own career development. Employees must take the initiative in identifying UM options and in advancing their career goals including:

- Determining skills, abilities, and career interests
- Establishing specific goals that develop career interests
- Developing a Career Development Plan with supervisor's approval and assistance, per 2 CCR 599.984(c)
- Maintaining a satisfactory level of performance in their current job and in academic or training courses
- Following through with planned training activities to reach goals and complete a career plan

Supervisors

Supervisors play an important role in an employee's career development and are responsible for:

- Providing guidance, approval, and support for the employee's Career Development Plan (CDP)
- Helping employees identify skills and interests to determine career goals

- Assisting employees in finding training that develops CDP-related knowledge, skills, and abilities
- Assigning tasks, when feasible, to facilitate accomplishment of CDP goals

Upward Mobility Coordinators

The Upward Mobility Coordinators, per 2 CCR 599.982, are responsible for:

- Implementing the department's UM program
- Informing employees of UM selection criteria
- Assisting employees or their supervisors with Career Development Plans and training options
- Coordinating, monitoring, and reporting department upward mobility efforts

Human Resources/Personnel Officers

Human Resources is responsible for:

- Identifying UM and bridging classifications
- Identifying possible career ladders
- Administering examinations in support of the UM program
- Advising on appointment eligibility and upward mobility options within state service
- Communicating monthly, quarterly, or semi-annually with UM Coordinator when appointments to LPEL classifications are made
- Providing information and resources on career development and opportunities
- Prominently posting or publishing UM development and job opportunities for a reasonable amount of time, per 2 CCR 599.984(a)

Training Offices

Training Offices are responsible for:

- Helping identify training or educational institutions that serve the educational needs of UM participants
- Offering consulting services to managers and supervisors to assist them with identifying appropriate training solutions for their employees

Equal Employment Opportunity Officers

Equal Employment Opportunity Officers are responsible for:

- Monitoring the effectiveness of the department's UM program
- Serving in a consultative role on UM
- Overseeing the program and providing the required goals and timetables to CalHR for the annual workforce analysis

Departments may assign the functions identified above consistent with GC 19400 et seq. and 2 CCR 599.890, et seq.

As a best practice, departments may include other program areas which can contribute to a successful UM program such as:

- Workforce/Succession Planning – Identifying skills gaps within critical department classifications and provide that information to the department recruiter
- Recruiter – Assisting with potential career ladders and meeting with UM candidates to identify promotional career opportunities in the department
- Budget Analyst or Officer – Identifying funding for UM initiatives and training plans

MARKETING THE UPWARD MOBILITY PROGRAM

The UM program should be marketed to department staff through the New Employee Orientation, newsletters, email distribution, Intranet posting, or during employee/supervisor one-on-ones and staff meetings. Consideration should be taken for employees with limited or no computer access to ensure equal opportunity for all employees. Advertising UM resources and contact information onsite with informational displays is one option for meeting the needs.

One method of recruiting UM candidates is providing a welcome letter to newly appointed employees in LPEL classifications, indicating the UM program participation criteria, and the UM Coordinator's contact information. The HR Office may regularly provide a list of new employees in LPEL classifications to the UM Coordinator to assist in identifying eligible employees.

Annual reminders from the department director should be sent to reinforce the department's commitment to support employees in UM. This guide references sample memoranda that can be used as a part of a department's marketing strategy.

Participation Criteria

Participation criteria for selecting employees in LPEL classifications to participate in the UM efforts is described in GC 19401 and further detailed in 2 CCR 599.984.

It is important to inform employees of the UM program participation selection criteria. Each interested employee in the LPEL classifications must have an equal opportunity to

be considered for participation in the department's UM program activities. Resources permitting, departments are encouraged to allow all interested employees who meet selection criteria to participate. Departments may limit participation if necessary and done fairly. Departments must clearly and prominently announce UM training activities and appointment opportunities to all potentially interested employees for a reasonable time, using an objective and consistent selection criteria.

The UM Coordinator will include the supervisor's input in evaluating UM participation applications. Some factors that may be considered in selecting employees for participation in UM program include, but are not limited to, the following:

- Department UM objectives – e.g., to increase participation in UM activities by a certain percentage, etc.
- Department staffing needs – UM programs may prioritize classifications with recruitment challenges
- Department available funds – Funds and other resources available for training and development of staff. The size of a department's budget and staff may impact the UM effort
- Employee tenure (e.g., permanent full time, intermittent, etc.) – An employee with permanent status may have priority over one without permanent status; a full-time employee might have priority over a part-time, or intermittent employee, etc.
- Employee performance in current classification – Departments do not have to select employees with performance issues in their current classification
- Employee motivation and potential for career advancement – Employee efforts to seek upward mobility opportunities and to complete career development plans. Motivation may be demonstrated by past self-development efforts and current career plans and efforts to prepare for advancement that the employee has initiated. Career advancement potential (i.e., knowledge, skills, and abilities) may be measured through an assessment of an employee's readiness for advancement and how long it will require the person to become competitive for promotion through UM training efforts
- Relevance of the training – The UM activity's relevance to the employee's career goals. A department does not have to select an employee for training that is unrelated to their career development goal

Upward Mobility Application

Employees must complete a UM application, obtain their supervisor's approval, and submit it to the department's UM Coordinator. The UM Coordinator will notify employees whether they have been selected to participate in the Department's UM program.

CAREER PLANNING FACILITATION

Career planning may be a good starting point for an employee considering advancement to a more challenging, higher paying classification. Career planning is a systematic analysis of an employee's interests, skills, knowledge, education, and experience so that future career pursuits can be mapped out to the greatest extent possible. It can be a way of choosing jobs which best match an employee's job skills and personal interests and can also assist an employee in selecting a job where the employee has the best chance of succeeding.

After an employee identifies their likes and dislikes in a job (e.g., working outside versus inside; no travel versus some travel; desk versus mobile job; work requiring manual dexterity or not; working with people or independently, etc.), the next step is to investigate and identify those potential career paths that coincide with the employee's skills, interests, and abilities. Career planning can be a valuable tool for employees who are striving to make a career change and can assist in pointing the employee in the proper direction.

Career Development Plan

A CDP supports the UM process and assists an employee by providing a means for growth and development in their current classification and future career advancement. Employees participating in UM programs are required to prepare a CDP, per 2 CCR 599.984(c). The plan should outline the specific career objectives, the steps that will be taken to develop the employee's knowledge, skills and abilities, and the estimated timetable for promoting to an entry-level technical, professional, or administrative classification. The plan should be a cooperative effort between the employee and their supervisor and other appropriate departmental representatives.

Participating employees must submit a CDP approved by their immediate supervisor to the department's UM Coordinator who reviews the plan to ensure all the required information is completed and that career goals and objectives are clearly identified.

If the participating employee does not maintain satisfactory performance on the job or does not maintain good standing in academic or other training activities, the department may suspend the employee's CDP until the employee regains good standing.

Career Mobility Options

Employees in state civil service have several career mobility options available to them: employment list eligibility; knowledge and use of bridging classifications and transfers between classifications; training and development (T&D) assignments; rotational assignments, etc. These mobility options are the most frequently used when facilitating a UM move within state civil service. The UM Coordinator and supervisor may want to explain each option clearly so that employees will be well informed before considering a specific career mobility option. Departmental UM Coordinators should identify which options are available within their department and regularly determine if they are viable options in accordance with bargaining unit contracts and civil service rules, laws, and regulations.

Rotational Assignment

A rotational assignment involves the voluntary movement of an employee from a current job assignment to another job assignment within their present classification. Rotations may occur within a small unit or between sections, divisions, or field offices and across departmental lines.

A rotational assignment can provide an employee with the opportunity to experience a variety of duties without changing classification. An employee will broaden their experience, gain additional technical or program knowledge, add depth and breadth to their skills and abilities and, in turn, increase their promotional opportunities.

Lateral Transfer

A lateral transfer is an option for an employee interested in changing their current job. Transfers allow employees to move to different classifications that have substantially the same level of duties, responsibility, and salary. It is best to consult with the department's Personnel office to determine the proper transfer eligibility.

Training and Educational Opportunities

All training is subject to constraints on available resources and depends on available training funds, the number of employees taking classes, and other training included in the department's training plan. Resources for meeting the department's training needs shall be allocated according to 2 CCR 599.819, subsections: (1) Job Required, (2) Job Related, or (3) Upward Mobility and Career Related.

Leave of Absence

A leave of absence is another option available to an employee interested in advancing and/or changing their career. Pursuant to GC 19991.2, a leave of absence may be granted to an employee seeking formal training or an intergovernmental assignment. Employees may request an unpaid leave of absence to attend college or other formal training institutions, accept a fellowship, or complete a degree. During this time, an employee does not receive any pay, benefits, reimbursement, or service credits. Upon returning from an approved leave of absence, an employee has the right to return to the same classification held prior to the approved leave, or into a comparable classification (i.e., one into which the employee can be laterally transferred). Approval is not guaranteed and will depend on each department's policies, procedures, and operational needs.

Training and Development Assignment

A Training and Development (T&D) assignment provides an opportunity to broaden skills and experience. A T&D assignment can improve the ability to perform the duties of a current assignment, help prepare for future promotions or facilitate entry into a new occupational field. It also provides a process for the movement of LPEL employees into ELTPA classifications by providing an opportunity to meet the minimum experience and education qualifications. A T&D assignment is a formal agreement between the employee, the current supervisor, and the new supervisor. The duration of agreements can vary from a few months to a maximum of two years.

To hire an individual on a T&D, the hiring manager must have a vacant position and be willing to allocate the extra time necessary for training purposes. From the employee's

perspective, the primary consideration in accepting a T&D assignment is the assignment is consistent with their career development plan and it provides developmental experience.

A T&D assignment may be terminated at any time by the appointing power or the employee. Upon completion or termination of a T&D, an employee has a right to return to their former position. If the employee has learned new skills and has gained experience while on the T&D, the employee can often successfully compete in examinations and may subsequently be appointed.

Bridging Classifications

Bridging classifications are developmental classifications designed to facilitate movement from sub-professional to professional and technical classifications. These classifications are integral in the UM program because they provide employees in LPEL classifications the opportunity to move, through lateral transfers and testing, to higher paying classifications.

One example of a bridging classification is the Management Services Technician (MST). The MST is a bridging classification to Staff Services Analyst. The result is a bridge from the clerical field to the analytical field. This option is further explained under the "Career Path and Career Ladder" section of these guidelines.

Job Sharing

Another consideration is locating a part-time or intermittent position that allows time for school, as well as a job. Subject to management discretion, if the job duties of a position can be divided in such a way that more than one person can do them on a less than full-time basis, job sharing can be an alternative. Job sharing is another innovative personnel management tool that can be used to pursue educational opportunities, while maintaining a partial income.

Employee Withdrawal from UM Program Participation

Occasionally, an employee elects to discontinue participation in the UM program. Department UM Coordinators are encouraged to communicate with the employee and assist with resolving any issues within reason that may possibly impede the employee's ability to effectively participate according to the UM plan. A good practice is documenting the employee's discontinuation of the program and ensuring all parties are notified.

CAREER PATH AND CAREER LADDER INFORMATION

Bridging Classifications

Bridging classifications are job classifications specifically established to provide employees in LPEL classifications the experience that will enable them to meet the minimum qualifications for ELTPA classifications. Bridging classifications are integral in UM because they provide the opportunity to link, through lateral transfer and testing, the LPEL classifications to higher paying classifications.

Examples of statewide bridging classifications that enable an employee to meet the minimum qualifications (MQs) for various future promotional examinations include the following:

<u>Bridging Classification</u>	<u>Schematic Code</u>	<u>Class Code</u>
Management Services Technician	JY40	5278
Budget Technician I	LF40	5221
Personnel Technician I	KY98	5160

Low-Paying Entry-Level Classifications

LPEL classifications do not necessarily have the lowest salaries but are classifications that have traditionally been low-paying and had little opportunities for advancement to higher paying TPA classifications. California Code of Regulations, title 2, section 599.981(f) lists the LPEL classifications.

Entry-Level Technical, Professional, and Administrative Classifications

2 CCR 599.981(g) lists the technical, professional, and administrative classifications into which LPEL classifications may advance. These ELTPA classifications are often referred to as UM classifications.

Career Ladders

Departments are encouraged to establish career ladders and identify bridging classifications to provide UM opportunities. Career ladder information may be helpful for employees when looking at the various types of careers available in state civil service.

For example, if an employee has not yet selected a career field and is looking for helpful information, one possible starting point is to obtain the classification specification for one or all the various bridging classifications that are available.

Classification specifications summarize the duties and responsibilities of a classification, provide examples of the work performed, and offer a breakdown of the classification's minimum educational and/or experience requirements. This classification information gives the employee additional information on a potential career option.

The department's Human Resources/Personnel Office should be consulted in determining departmental UM bridging classifications and the corresponding career ladders.

DEPARTMENT REPORTING RESPONSIBILITIES

As required by GC 19402 and further detailed in 2 CCR 599.985, departments must track Upward Mobility Program efforts including:

- The number of expected appointments of employees from qualified LPEL classifications to UM classifications

- The number of employees in qualified LPEL classifications who are eligible for UM within the department/agency
- The number of employees currently participating in the department's UM program
- The number of appointments to UM classifications over at least a three-year period
- The amount of money spent annually on UM efforts

The Workforce Analysis Manual provides more information on annual reporting responsibilities. The department's EEO Officer or person designated to prepare the Workforce Analysis may email WorkforceAnalysis@calhr.ca.gov to obtain access to the manual located on the workforce analysis dashboard.

Establishment of Upward Mobility Goals

Government Code section 19402 requires state departments to annually develop UM hiring goals and timetables and provide the data to CalHR. The projected goals and timetable data include the number of employees in LPEL classifications expected to progress to ELTPA classifications. Departments must base goals on an analysis of the history of appointments to entry-level technical, professional and administrative classifications, the number of anticipated appointment opportunities to ELTPA classifications in the coming fiscal year, and the availability of qualified upward mobility candidates eligible for appointment. For additional information on setting UM goals, discuss the process with your department's EEO Officer.

Approval of Upward Mobility Program Efforts and Goals

Departments submit UM data to CalHR for review and approval through the annual workforce analysis process. The department's UM data submission includes the following:

- UM appointment goal data
- Description of the actions that demonstrate a good faith effort to comply with the UM requirements contained in GC 19401
- Number of employees formally participating in the department's UM activities
- Amount and percentage of the department's training budget assigned for UM development activities

CalHR evaluates each department's UM data submission and provides feedback intended to assist departments in administering an effective UM program.

GLOSSARY

Academic Counseling

Counseling provided at the University and Community College Systems throughout California that assists students in planning their educational curriculum to meet their career goals.

Bridging Class

A specialized classification established to facilitate the movement of individuals from LPEL to ELTPA classifications. These classes are an integral part of career ladders and UM programs.

Career Development

Provides employees a means for growth and development in their current classification and an opportunity to work toward UM and career advancement.

Career Ladders

For purposes of UM, these are the succession of job classifications in which employees may normally gain experience to advance from LPEL classifications into technical, professional, or administrative classifications.

Career Planning

The systematic analysis of interests, skills, knowledge, education, and experience to determine future career pursuits to the greatest extent possible. Career planning assists employees in setting objectives needed to achieve their occupational goals.

Career-Related Training

Training that is designed to assist in the development of career potential and is intended to help provide an opportunity for self-development while assisting in the achievement of a department or the State's mission. Career-related training may be unrelated to a current job assignment.

Career Lattice

A chart or diagram showing the different directions a career can move.

Class Title

The official civil service title used when referencing a particular classification.

Classification Specifications

These documents summarize the duties and responsibilities of a classification, provide examples of the work performed, offer a breakdown of the classification's minimum education and experience requirements, and will be useful in planning career development.

Entry-level Technical, Professional, and Administrative Classifications

For purposes of UM, these are ELTPA classifications for which hiring is typically open to the public and to which employees in the department's LPEL classifications may advance. These classifications are often referred to as UM classifications.

Goal

The purpose or outcome toward which effort is directed.

Job-Related

Knowledge, skills, abilities, and experience that are relative to job experience. For purposes of training, it is provided to increase the employee's proficiency in their current job or to prepare them for a job assignment planned in the future.

Job Required

Training designed to assure adequate performance in an employee's current assignment or classification. This includes orientation training, training made necessary by new assignments or new technology, refresher training for the maintenance of ongoing programs, safety training, and training mandated by law or other state authority.

Job Restructuring

This is a component of an effective UM program and includes the development of career ladders and lattices and modification of requirements when barriers exist.

Lateral Transfer

A transfer that allows an employee to move to different classifications that have substantially the same level of duties, responsibility, and salary.

LPEL Classifications

For the purposes of UM, these are occupations that are traditionally low-paying and provide fewer opportunities for advancement into TPA jobs but are not necessarily the lowest salaries.

Minimum Qualifications

The list of minimum education and experience requirements of a particular job class found in a classification specifications description. Information on specific license, credential, etc., requirements will also be included.

On-the-Job Training

Training that is an alternative to formal classroom training, including formal and informal training sessions at the worksite.

Out-Service Training

Training sponsored by non-state agencies, which is open to the public as well as persons employed by the State and sponsoring agencies. The State does not maintain control over course content. Such training includes courses or activities offered through

accredited colleges and universities or conducted by private consultants, firms, or other non-state agencies.

Permanent Employee

Permanent status upon lawful retention in his or her classification after the completion of a mandatory probationary period.

Salary Range

This means the range of rates between, and including, the minimum and maximum rate currently authorized for the classification.

Training and Development

The assignment of duties on a part-time or full-time basis for the purpose of training to either broaden an employee's skills and abilities in their present occupation, prepare them for a career in a different occupational field, or improve their advancement potential.

Upward Mobility

The development and advancement of employees from LPEL classifications to ELTPA classifications. Participation in UM efforts is not a guaranteed promotion but a fair and equal opportunity to be considered for advancement. It is a part of career-related training that specifically applies to employees who participate in the UM program.

Upward Mobility Coordinator

The person(s) responsible for implementing the UM program, ensuring all employees have knowledge about and access to the program, and annually reporting the program accomplishments to CalHR.

Upward Mobility Program

A program where career opportunities are developed, published and assistance provided, which will allow employees in LPEL classifications to develop and advance to their highest potential.