



THE CURRENT STATE OF

Organizational Change Management at CalSTRS

A SUMMARY of FOCUS GROUP FINDINGS

CALSTRS[®]

PURPOSE:

CalSTRS is in the process of building a formalized Organizational Change Management (OCM) program to support, engage and empower all employees through times of transition. The purpose of these facilitated discussions was to meet with key organizational change management business partners and stakeholders to:

- Discuss the OCM program development plan over the next three years.
- Provide input to evaluate and baseline the current state of OCM at CalSTRS.
- Gather input and discuss feedback to strengthen our business partnerships.

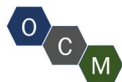
More about the focus group process:

Each focus group lasted approximately one hour and was conducted virtually by members of the Organizational Development Consulting team in Human Resources. Participants were asked a series of questions related to the current and future state of OCM, focusing on the partnership within their business area. The goal was to gather input around how to best integrate our services and strengthen our partnership for future change management efforts.

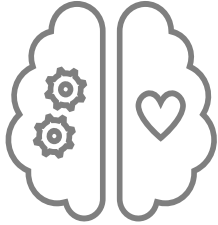
Who participated in focus groups?

Groups were determined by business area, and participants were selected based on job duties, influence and involvement in current and future CalSTRS OCM efforts. Select staff and leaders were identified as key business stakeholder based on their role, unique insight and influence. Representation included a diverse array of partnerships and projects:

PROJECTS	PARTNERSHIPS	ENTERPRISE-WIDE
<ul style="list-style-type: none">• Pension Solution• Headquarters Expansion• MS Teams, SAP Concur• HR Link	<ul style="list-style-type: none">• Project Management Office• Communications Division• Enterprise Strategy Management• Human Resources Division	<ul style="list-style-type: none">• Path Forward – Return to Office• Leadership Development• Training Services• Open invitation to all staff



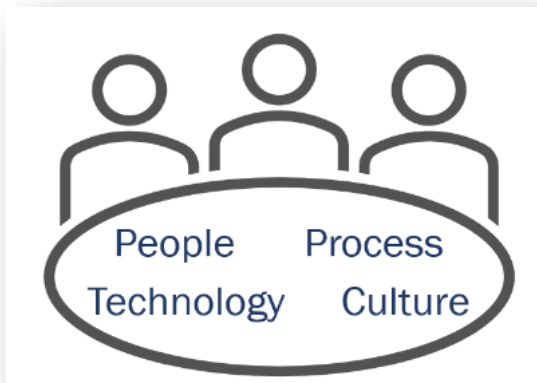
ALIGNMENT: This effort is aligned with CalSTRS Strategic Plan, 2022-25 Goal 2 on “Leading Innovation and Managing Change.”



Pursuing this goal will put CalSTRS on the path to realizing our 10-year future vision as follows:

2031 vision of success measures	As demonstrated by
Culture supports strategic vision	<ul style="list-style-type: none">• People interactions and coordination.• Responsiveness to change.

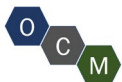
IN PRACTICE: How was this information used?



Input gathered informed ways in which to strengthen collaboration, define roles and responsibilities more clearly, and enhance the OCM program.

Participants provided input to help evaluate the current state of OCM and plan toward its more formalized future state.

Collectively, key thematic findings highlighted in this report will contribute to strengthening organizational change management efforts through a holistic approach around people, processes, technology and culture.

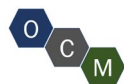


Maturity Model Assessment

Adapted from ProSci, a change management industry leader, the OCM Maturity Model has enabled organizations to document their current level of OCM maturity and develop actionable plans to enhance their change management efforts.

71 focus group participants from across the organization were asked to give individual input. Their collective ratings help assess our organization's change maturity level to map out a strategy for growing our organizational change management capabilities and services. By advancing our maturity level as outlined below, CalSTRS can focus holistically on the people, process, technology and cultural aspects of change, leading to greater success on enterprise-wide change initiatives and projects.

CALSTRS	Level 1 Ad hoc or absent	Level 2 Isolated projects	Level 3 Multiple projects	Level 4 Org. standards	Level 5 Org. competency
Change management is seen as....	A distraction from the focus of a project.	Important by some, unimportant by others.	A structured approach that adds value.	An important success factor on all projects through a common and standard approach.	Essential on all projects and initiatives as a critical core competency for the organization
Change management is applied when...	Not at all, or as a last resort and as a reaction.	On few projects, from initiation; on some projects, in reaction; on most projects not at all.	Localized in certain parts of the organization; at initiation on some projects; still missing or mostly reactive.	Regularly at project initiation or planning; integrated into project management approach.	At the start of projects and initiatives and inseparable from project deliverables or change initiative outcomes.
Change management is practiced by...	Dependent on particular individual practitioners; not at all by managers and leaders.	Handful of unaffiliated practitioners.	Practitioners who are starting to work together; some senior leaders, mid-level managers and supervisors.	Most practitioners and project teams; most senior leaders, managers and supervisors. Potentially a centralized functional group.	Practitioners, project teams, technical professionals; all senior leaders, managers and supervisors; centralized functional group.



Themes:

- OCM exists at varying levels across different parts of the organization
- Different business areas define and value OCM inconsistently
- There is an opportunity for partnering resources to work more collaboratively
- Staff and leaders will need to be supported during change efforts and transitions

Opportunities:

- Define OCM process and services → how to find and request OCM
- Build awareness and formalize education org-wide
- Clarify roles and responsibilities between partnering resources
- Engage staff and leaders in the change process

Recommendations:

- Define and formalize CalSTRS OCM and how to request services
- Develop a centralized location for OCM information and resources
- Create OCM educational opportunities for the organization across all levels
- Integrate clearly defined roles and responsibilities between Change Partners
- Provide support and development opportunities for staff and leaders to move through change

