

# LEADERSHIP DEVELOPMENT AND SUCCESSION PLAN 2022-25

HUMAN RESOURCES | SEPTEMBER 2022



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THE GOAL OF THIS PROCESS IS NOT TO MAKE CURRENT MANAGEMENT REPLACEABLE, BUT TO **SECURE** THE **CONTINUITY** AND CONTINUED **GROWTH** AND **SUCCESS** OF AN ORGANIZATION.

**ED KROW,**  
CHIEF KNOWLEDGE OFFICER &  
SPOKESPERSON, GENOEMOTE;  
TALENT TRANSFORMATION EXPERT

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We encourage you to “Go **Green**” by accessing the CalSTRS **LEADERSHIP DEVELOPMENT AND SUCCESSION PLAN** on Central (SharePoint Site).









# A MESSAGE FROM CALSTRS DIRECTOR OF HUMAN RESOURCES

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The California State Teachers' Retirement System is pleased to present its 2022-25 Leadership Development and Succession Plan. The plan aligns with and supports the CalSTRS' Strategic Plan, and Workforce Plan, specifically focusing on leading innovation, managing change, and maintaining the sustainability of the organization through ongoing development of staff and implementation of strategic succession management initiatives. The development of this three-year plan was a collaborative process involving employees and stakeholders.

The initiatives outlined in this plan focus on sustainable, strategic, and creative solutions to succession management. Investing in leadership and staff development and succession management is crucial to our long-term performance, growth and continued success in fulfilling our mission. Leadership development continues to be a key component in achieving enterprise-wide strategic goals, maintaining optimal business operations and cultivating an engaged and diverse workforce.

Our most valuable asset is our employees. With the organization's mission at the forefront, this plan refreshes CalSTRS commitment to deliver a culture that invests in our employees' growth so that we may secure the financial future and sustain the trust of California's educators.

KRISTEL **TURKO**

*Director of Human Resources*



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# INTRODUCTION

## Foreword

The California State Teachers' Retirement System's Leadership Development and Succession Plan is the result of analysis of the organization's leader and mission critical workforce to address and support current and future succession management needs. Succession management, particularly for critical leadership positions, and ongoing development of staff supports the accomplishment of the organization's strategic initiatives included in CalSTRS' Strategic Plan.

This Leadership Development and Succession Plan includes new and ongoing development and succession management strategies to continue to support business continuity and successful accomplishment of our mission. This plan is an accompanying document to the CalSTRS Workforce Plan 2022-25; organization-wide workforce management information and strategies are detailed in the Workforce Plan.

## Succession Planning

### What is Succession Planning?

Succession planning is a process and strategy for mitigating risks associated with leadership and business continuity in the organization's key and mission critical positions, and focuses on developing and supporting a large, competent, and effective talent pool of CalSTRS staff.

### Why is Succession Planning important?

Succession planning is vital for safeguarding the organization against unplanned and unexpected change; it is a type of risk management that ensures the functions of the organization's critical positions are well understood. The ultimate goal of succession planning is that every key or mission critical position within an organization has at least one person ready to successfully assume the roles and responsibilities of the position.

### What is involved?

Succession planning includes any effort designed to ensure the continued effective performance of an organization, division, or unit by making a plan for the replacement of the organization's leaders over time. A plan is developed to bridge the gap between available talent and the organization's future workforce needs.

## Purpose

The CalSTRS Leadership Development and Succession Plan supports the initiatives of the 2022-25 Workforce Plan which is a high-level workforce analysis.

The initiatives and strategies described in this plan are derived from an in-depth analysis of CalSTRS internal workforce, in alignment with CalSTRS Strategic Plan Goals, Human Resources division objectives, leadership development opportunities in place or planned, and best practice research from both the private and public sectors. The information in this plan provides a high-level framework to support leadership in developing and implementing succession planning strategies to meet long-term organizational needs.

This plan reflects CalSTRS commitment to a long-term, sustainable, and highly functioning organization by ensuring that leadership is prepared with adequate information and strategies to effectively manage the transition of:

- Senior leaders into executive roles
- Front-line leaders into senior leadership roles
- Staff into leadership roles
- Ongoing development of staff at all levels

Through these efforts, CalSTRS actively fosters leadership continuity in critical positions affecting organizational performance by encouraging the growth, retention, and development of all employees.

The Human Resources Division is committed to supporting the CalSTRS workforce. The Training Services team has development programs and offerings for employees at every stage of their career. The Knowledge Transfer and Transition, Mentorship, and Leadership Development programs are critical parts of CalSTRS' succession management program.

From benefits counseling to career counseling, from onboarding to mission critical position management, from processing Requests for Personnel Action to processing requests for formal recognition, all of HR's services are designed to support CalSTRS' greatest asset—our people. The HR division will continue to engage and work closely with leadership and staff on a wide variety of succession planning implementation activities over the next three years, and beyond.

# WORKFORCE OVERVIEW

## Current Workforce Profile

The workforce snapshot below provides an overview of the CalSTRS workforce as of December 31, 2021. CalSTRS has 1,271 total filled positions, which is an increase from 1,158 in 2017. A majority of the growth is attributed to support CalSTRS major projects, including the Collaborative Model, Pension Solution, and Headquarters Expansion.

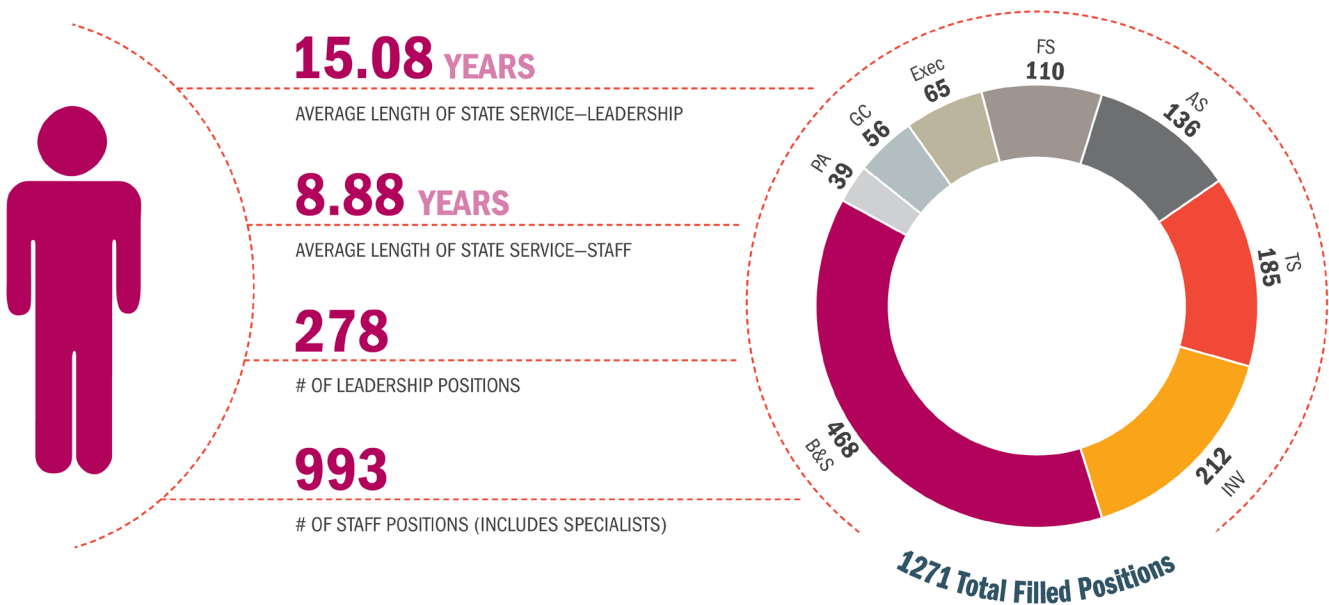
The Investments Branch has seen the largest growth in positions at a 40% increase. The Investments Branch has been working towards the adoption of the Collaborative Model and in an effort to ready the organization, moved through the Pillars Project that has been a catalyst for growth in partnering business areas. Administrative Services has seen a 13% growth over this period as a result of additional support in Investment Procurement, Travel, and the expansion of the Talent Acquisition team to strengthen recruitment efforts.

Human Resources Organization Development saw growth in training resources to support Pension Solution. Similarly, Financial Services realized a 11% growth in support of Pension Solution, as well as a reorganization within Investment Accounting.

Another area of growth was within Public Affairs. Due to the increase in complexity and sensitivity around certain topics, including divestment and pension spiking, in addition to CalSTRS increased efforts in sustainability, socially responsible and conscious practices of our investments and partners to better align with CalSTRS values, Public Affairs has realized a 15% growth.

The average age of CalSTRS staff is 42.29, which is slightly younger compared to the average age of 43 within the greater State of California civil service workforce. Staff has, on average, 8.88 years of state service while Leadership has, on average, 15.08 years.

## EMPLOYEE COUNT AND YEARS OF STATE SERVICE



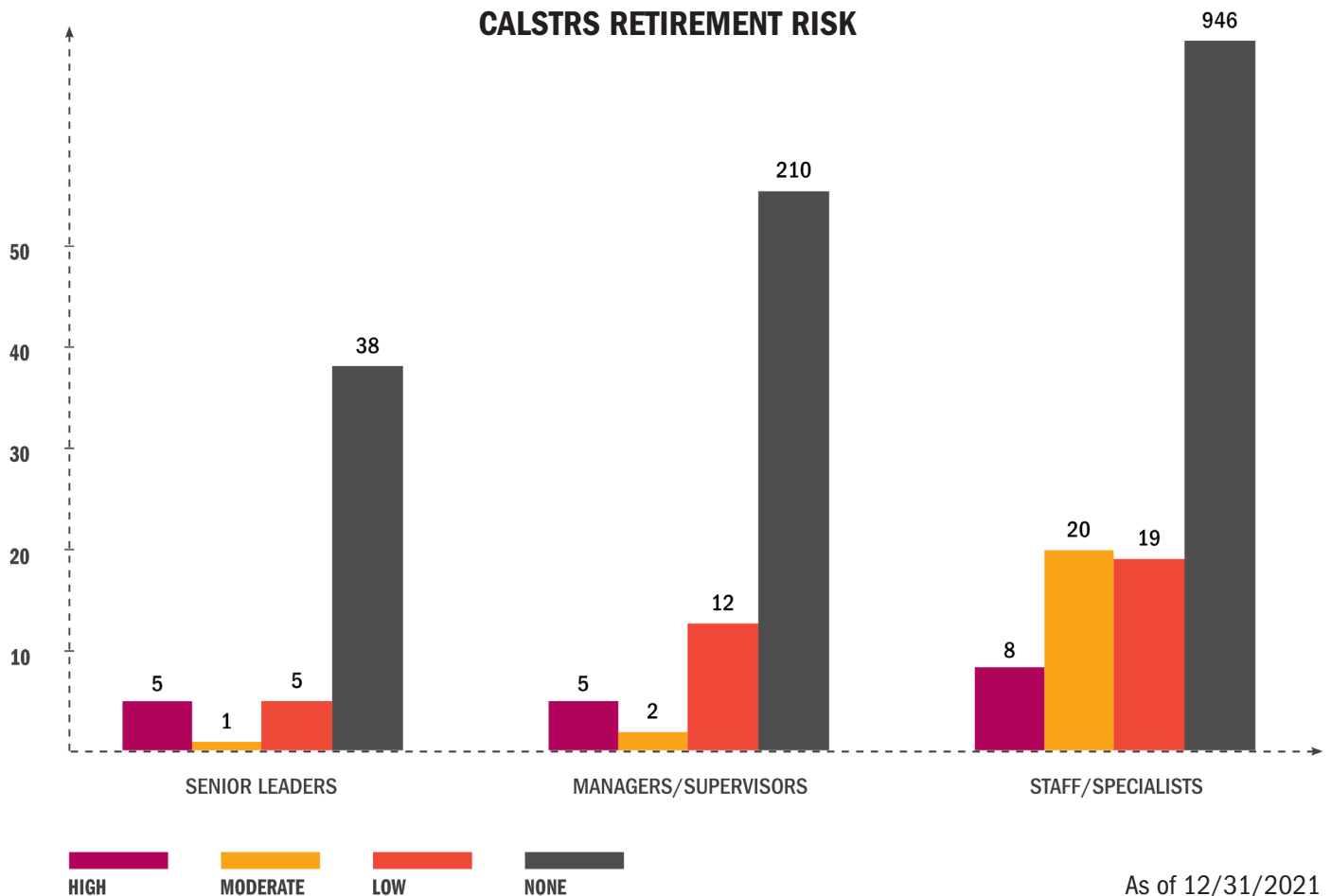
As of 12/31/2021

## Retirement Risk

Retirement risk is calculated using a combination of age and years of state service. In the past CalSTRS utilized the CalPERS Classic 2% at 55 retirement formula cutoffs of age 55+ and 20+ years of service as the basis for our risk categories. In 2013 the Public Employees' Pension Reform Act changed the retirement formula for new state employees to 2% at 62. In 2020 the CalSTRS human resources team adjusted the working definitions of retirement risk and formulated new risk categories. This update better reflects true retirement risk as it accounts for the multiple retirement formulas at play in our workforce, and it is based on genuine CalPERS member state employee retirement data published by CalPERS actuarial staff.

## Retirement Risk Scale

| RISK LEVEL | CRITERIA |                  |
|------------|----------|------------------|
|            | AGE      | YEARS OF SERVICE |
| NONE       | <55      | N/A              |
|            | 55 to 59 | <25              |
|            | 60 to 61 | <20              |
|            | 62 to 64 | <8               |
|            | 65+      | <5               |
| LOW        | 55 to 59 | 25 to 31         |
|            | 60 to 61 | 20 to 27         |
|            | 62 to 64 | 8 to 14          |
|            | 65+      | 5 to 10          |
| MODERATE   | 55 to 59 | 32 to 36         |
|            | 60 to 61 | 28 to 31         |
|            | 62 to 64 | 15 to 19         |
|            | 65+      | 11 to 19         |
| HIGH       | 55 to 59 | 37+              |
|            | 60 to 61 | 32+              |
|            | 62+      | 20+              |





## CalSTRS Competencies

HR tracks performance ratings and leverages strengths and weaknesses in individual employee performance to support enterprise-wide priorities and development strategies. Since strong communication is a key driver for employee engagement, increased focus on improving communications through learning opportunities, board meeting highlights, Central TV and Quarterly Performance Review updates offered to staff and leadership have been implemented.

Through the analysis of this data, we have also determined that there is an opportunity to better prepare our leaders in vision and strategic thinking. To improve organizational performance and understanding of the value of strategic thinking, the Enterprise Strategy Management division has implemented quarterly performance management reviews for several areas of the organization. Business area leaders and data stewards work with ESM to set, track and report performance goals to executive staff.

These quarterly reporting meetings drive improvements at the operational level. Regular meetings held to manage performance result in expanded understanding of strategic goals and contributes to continuous improvements to all aspects of the business.

HR has established a Performance Development team to be a dedicated resource for employee performance development. Over the course of the previous plan, the Performance Development team refreshed the Annual Performance Review competency groupings to clearly align competency development and appraisal through the leadership levels. They also developed and introduced My Development Journey – a process and tools staff can use to help direct and further their own career development in partnership with their leaders and the organization.

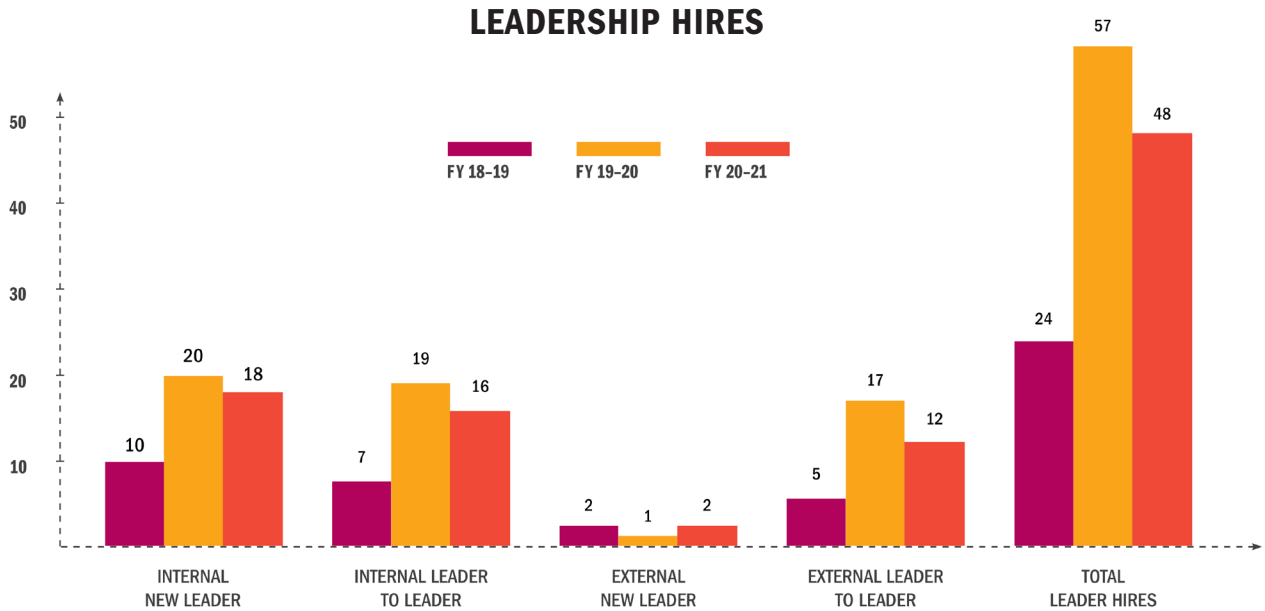
The Performance Development team regularly ensures performance reviews, probationary reports, and other related documents are appropriately completed and properly documented. Each performance review or probationary report is read and reviewed to proactively respond to any performance issues that arise or become apparent during the review process. Individual Development Plans received by this team are submitted to the Training Services team for tracking and review.

CalSTRS is heavily focused on ensuring business areas are fully compliant with providing timely, meaningful, documented feedback to every employee. The performance and development cycle of individuals plays a pivotal role in improving organizational performance. This cycle supports the succession planning process by formally preparing and building a pipeline of highly qualified, skilled, and ready individuals to take on more complex and higher-level roles.

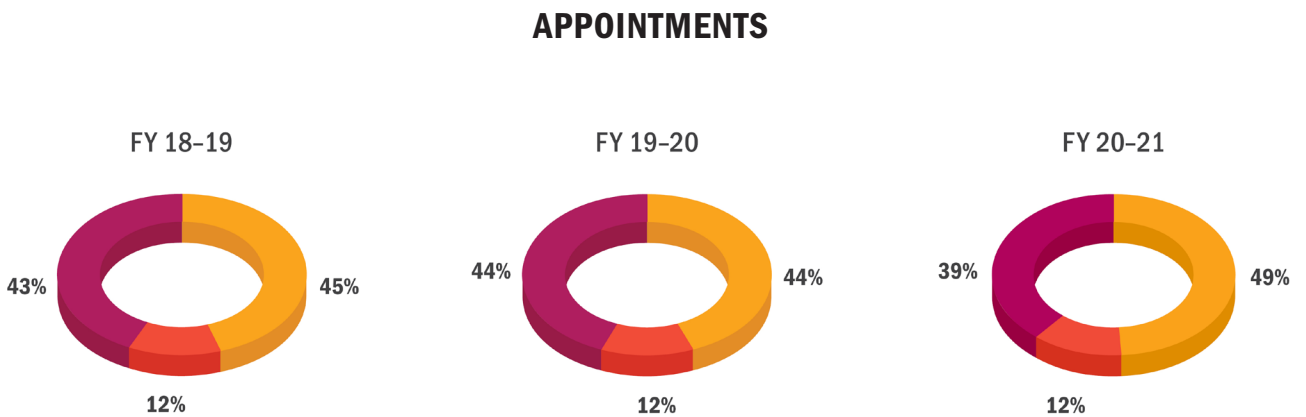
Competency pipelines show how classification families build on each other in a clear path from entry-level staff all the way to executive. One of the major initiatives in the CalSTRS 2022-25 Workforce Plan is to refresh our Competency Model and Guide. Part of this refresh will include facilitating focus groups with representatives from across the organization to ensure that our Model and pipelines continue to be comprehensive, relevant, and sustainable. Please see the 2022-25 Workforce Plan for information about competency gaps at CalSTRS.

## Growth/Movement

CalSTRS regularly hires and promotes internal staff. In fiscal year 2020-21, 71 percent of the leadership hires made were internal staff either moving within leadership via promotion or transfer, or internal staff promoting into leadership for the first time. The chart below shows CalSTRS' success through succession planning and leadership development, as well as our successful ability to attract and recruit fresh talent externally to fill our leadership roles.



Additionally, we continue to balance our hiring between internal promotions, internal transfers, and external hires (either new to state service or new to CalSTRS from another state department) as can be seen in the graphic below.



| # of appointments   | FY 18-19   | FY 19-20   | FY 20-21   |
|---------------------|------------|------------|------------|
| Internal Promotions | 156        | 125        | 115        |
| Internal Transfers  | 45         | 34         | 36         |
| New Hires           | 166        | 124        | 146        |
| <b>Total</b>        | <b>367</b> | <b>283</b> | <b>297</b> |

■ Internal Promotions    
 ■ New Hires    
 ■ Internal Transfers

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## MOVING FORWARD

### Ongoing Workforce Development

Human Resources encourages each employee to invest in themselves by utilizing the My Development Journey to think of their goals within the annual development cycle. This includes consideration of completing a Individual Development Plan (IDP). IDPs are not required to be completed, but they are the best way for an employee to focus on their own development. During this cycle they may also consider participating in other developmental offerings like mentorship or career development. If an employee is interested in furthering their career and would like help, Career Counseling services are available. Staff can request career counseling via the Career Services SharePoint site.

The professional development programs at CalSTRS have supported our internal staff in their development and growth. They include our Upward Mobility program through Pre-Analyst Academy, Analyst Academy, Lead Person Series, Emerging Leadership Series, Manager's Academy, and the IGNITE Program. Using hands-on and experiential learning, cohorts, strengths-based leadership and more, these development opportunities comprise CalSTRS' formalized series of courses available to staff. CalSTRS also supports a wide range of development opportunities beyond these series, such as peer learning groups, self-paced online learning modules or webinars, articles and videos on our Wellness and Diversity, Equity & Inclusion sites, and many others.

### Current Workforce Challenges

Succession planning efforts have successfully identified workforce gaps and challenges that now are monitored and strategically addressed. Our internal pipelines are successfully transitioning staff at all levels of the organization. Some of the areas of concern that we will address and/or monitor throughout the duration of this plan are:

Senior Leader Retirement Risk – 45% of our senior leaders are eligible for retirement within the next five years. Based on the new retirement risk scale, currently 24% of our senior leaders are at moderate to high risk of retiring. As leaders retire, it is important that knowledge transfer and transition strategies are in place to support business continuity.

Competency Model and Guide Refresh – to ensure that our Model and pipelines continue to be comprehensive, relevant, and sustainable, we will refresh the CalSTRS Competency Model and Guide through facilitated focus group sessions with representatives from across the organization.

### Future Workforce Considerations

As CalSTRS focuses on modifications and replacements of technological systems, and continues to bring assets in house in Investments, CalSTRS workforce will continue to grow. These changes will increase the complexity of operational and administrative support, expanding the need for support staff, impacting space needs, and costs involved with successfully recruiting, onboarding, and training new members of the workforce.

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# MISSION CRITICAL POSITION MANAGEMENT AND OTHER SUCCESSION STRATEGIES

## Mission Critical Position Management

Mission critical position management is a succession planning best practice with the intent to mitigate organizational risk. Mission critical position management typically encompasses less than 20 percent of an organization.

The process includes:

1. Identifying which roles meet the mission critical criteria
2. Creating position profile forms with:
  - a. Classification and working title
  - b. Incumbent name
  - c. Position number
  - d. Leader name and title
  - e. Current incumbent's flight risk
  - f. Desired education or experience beyond minimum qualifications
  - g. Key characteristics for success in the role, and
  - h. Action plans listing applicable succession management strategies
3. Implementing action plans
4. Monitoring and refreshing regularly

Mission critical positions are positions that meet all three of the following criteria:

- Exert critical influence on the operational activities or the strategic objectives of the organization.
- Have characteristics unique to the organization making it difficult to fill.
- Put CalSTRS operations immediately at risk if vacated.

Positions can also be temporarily critical due to the position's role as a leader or unique subject matter expert for an enterprise-level project; positions meeting this criterion are deemed Project Critical.

The loss of an incumbent in a mission critical position can generally be considered influential enough to slow or stop the operation of a unit, division, branch or the organization. That

impact would continue to be felt until another person is hired and effectively trained or learns the nuances of the position. Mission critical position management, which requires regular maintenance by staff, helps CalSTRS maintain business continuity and ensure that all identified positions have documented succession strategies in place.

Although CalSTRS has not yet experienced an unexpected vacancy of a mission critical position, the potential for major knowledge gaps or the inability to complete projects remains a threat to our organization.

## Knowledge Transfer and Transition

The Knowledge Transfer and Transition program continues to evolve. Although use of the program is driven primarily by business areas and their needs, all parts of the organization are encouraged to create functional org charts, to fill out knowledge transfer and transition forms to share explicit knowledge within their business areas, and to organize policies and procedures in an accessible way.

The KTT program's SharePoint site offers tools necessary for a robust program available to the entire organization. HR will continue to encourage use of the knowledge transfer/transition concepts to the organization by incorporating KTT into the Mission Critical Position Management program and facilitating meetings with groups of managers about how the tools in the SharePoint site can best be used to the benefit of their current and future workforce.

## Senior Leader Transition Plan

The Senior Leader Transition Plan provides CalSTRS with a basis to outline strategies for addressing developmental gaps and to ensure support for staff stepping into senior leadership roles. The Senior Leader Transition Plan is based on CalSTRS leadership competencies, Executive Key Drivers for competency bridging, and information gathered during interviews with current senior leaders.

## Mentorship

Human Resources launched the CalSTRS Mentorship Pilot Program in February 2018. In May 2019 the program was made available to the entire organization. When the majority of the organization began working from home due to the



pandemic, the mentorship program was translated to a virtual environment. In December 2021, the first all virtual program was piloted. Thirty-four employees participated in the program, representing a broad spectrum of branches, divisions, levels, and roles within CalSTRS.

The current mentorship program was built upon the initial vision of the pilot implemented in 2018, with additional enhanced features focused on diversity, equity and inclusion, social/emotional intelligence, and wellness. The emphasis of the current program is to develop the whole person.

### **Specialist Usage**

Specialists are non-supervisory subject matter experts that demonstrate expert level business knowledge and are highly skilled. As CalSTRS continues to get sophisticated with the use of technology, assessing enterprise-wide performance, and related process improvements, staff members across the organization are being tasked with supporting the change in work, sometimes resulting in the need for higher-level skill sets. To meet this demand, many in-house staff members have been promoted into manager/specialist roles. Manager/specialist positions are desirable roles for staff because they provide a career path for the analyst levels and include higher compensation that aligns with higher level duties and responsibilities.

As a retention and project strategy, the specialist option has been a major asset to the organization. It allows the promotion and retention of knowledgeable, competent employees and recognizes their hard work, diligence and subject matter expertise. A challenge with the use of specialists has been the lack of development as a supervisory leader that would allow for the continued growth of the staff member as well as meet the demands of the organization turnover. As CalSTRS' specialists' numbers grow, the Leadership Development consulting team is growing the development opportunities for staff in these roles. Specialists are increasingly exposed to leadership skills through peer learning groups and more as part of CalSTRS' succession management programs. This allows the organization to leverage and promote our internal staff to fill vital leadership positions and continue to develop and grow our internal talent pools across the organization.

### **Talent Acquisition**

Talent Acquisition is the strategic function of finding and hiring staff that meets the organization's unique needs and workforce goals. The Talent Acquisition Team guides and empowers CalSTRS leaders in selecting the best talent through an intentional and engaging recruitment process, which is tracked and reported through quarterly strategic business plans and the Operations Performance Review.

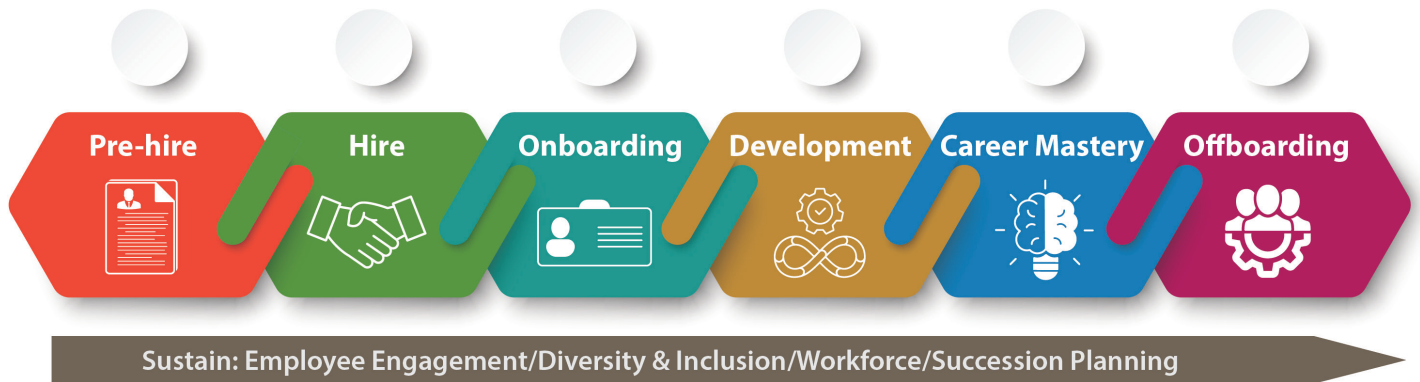
The TA Team analyzes and supports efficiencies to streamline the hiring process and uses platforms such as LinkedIn Recruiter to build candidate pipelines and target passive candidates. In collaboration with CalSTRS leaders, the TA Team uses industry best practices to solicit qualified candidates for niche positions and ensure a positive candidate experience.

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## EMPLOYEE LIFE CYCLE

The employee life cycle pipeline shows how each stage is connected to the next with engagement, diversity, equity and inclusion, and workforce and succession planning tying it all together and affecting every aspect of the employee lifecycle from pre-hire through offboarding.

### CalSTRS Employee Life Cycle



## INITIATIVES AND ACTIVITIES

| <b>Initiative</b><br><i>How can we bridge the gap between current and future outlook?</i>  | <b>Key Activities</b><br><i>What steps do you need to take to meet the initiative?</i>  | <b>Deadline</b><br><i>When will it be completed?</i>  | <b>Proposed Performance Indicators</b><br><i>How will we know we achieved our goal and what will success look like?</i>  |
|--|---|---|--|
| <p>Incorporate structural and behavioral DE&amp;I strategies into leadership development programs and processes</p>  | <p>Partner with DE&amp;I for awareness and adoption of strategies</p> <p>Assess gaps in leadership development related to DE&amp;I strategy</p> <p>Reassess and update leadership development processes and content to align with updated CalSTRS DE&amp;I strategy as it evolves over time</p> | <p>This initiative is dependent upon CalSTRS DE&amp;I enterprise initiative and will align with activities in the new DE&amp;I plan for the organization.</p>   | <p>Gaps in leadership development program have been assessed</p> <p>Leadership Development Programs updated to address gaps discovered from the assessments</p>              |
| <p>Establish a leadership advisory group in CalSTRS to incorporate a 360 view into leadership programs and processes for the greatest benefit of leaders</p> | <p>Setup the structure and process of the Leadership advisory group</p> <p>Recruit the correct people to participate</p> <p>Pilot a session to see what will work best</p> <p>Launch for two quarters to see if it is beneficial and work time investment for all</p> <p>Assess outcomes</p>    | <p>Sept-Dec 2022 set up structure and process.</p> <p>Jan-March 2023 recruit and Pilot a session</p> <p>April 2023 Launch leadership Advisory Group</p> <p>2024 Access outcomes and value. Go/no go</p> | <p>Pilot of the Leadership Advisory Group has been launched with participants</p> <p>Pilot assessment complete</p> <p>Leadership Advisory Group in place and operational</p> |

| <b>Initiative</b><br><i>How can we bridge the gap between current and future outlook?</i> | <b>Key Activities</b><br><i>What steps do you need to take to meet the initiative?</i>   | <b>Deadline</b><br><i>When will it be completed?</i>  | <b>Proposed Performance Indicators</b><br><i>How will we know we achieved our goal and what will success look like?</i>   |
|---|--|---|---|
| Create a leadership coaching program to support development and career goals              | Research coaching structures and best practices<br><br>Assess and recommend a sustainable coaching structure for leaders<br><br>Pilot a leadership coaching program.     | Jul-Dec 2022 Research coaching structures and best practices for an internal coaching program. Design the components of the coaching program<br><br>Jan-Jun 2023 Recommend a sustainable framework for internal coaching in CalSTRS<br><br>September 2022-Jun 2023 – Select and certify internal resources to coach within CalSTRS<br><br>July 2023-Feb 2024 Implement a pilot coaching program for new leaders<br><br>By June 2024 Sustainable coaching program in place | Completed research for building an internal coaching systems model<br><br>The components of the coaching implementation plan are designed and approved<br><br>X internal resources have been certified to provide internal coaching<br><br>Pilot coaching program has been launched with participants<br><br>Pilot coaching program assessment completed<br><br>Internal coaching program in place and operational in CalSTRS |
|   | Training for leaders and employees on the My Development Journey which would help with the engagement, development, performance and recognition of all CalSTRS employees | FY 2024-25  | Through this training, our workforce will be supported and able to navigate the tools available to them and services provided by HR which will increase employee engagement, development, performance, and recognition.   |



| <b>Initiative</b><br><i>How can we bridge the gap between current and future outlook?</i>  | <b>Key Activities</b><br><i>What steps do you need to take to meet the initiative?</i>   | <b>Deadline</b><br><i>When will it be completed?</i>   | <b>Proposed Performance Indicators</b><br><i>How will we know we achieved our goal and what will success look like?</i>   |
|--|--|--|---|
| Introduce design thinking tools and practices to support leadership innovation and change mindset  | Research design thinking tools<br><br>Introduce design thinking tools<br><br>Pilot design thinking tools into workshops for leaders.                   | July 2023 begin<br><br>Launch pilot in 2024.   | Leaders have awareness of Design thinking practices and are able to incorporate innovation tools into their leadership practices<br><br>Innovation mindset increases in the organization and is thought of outside of technology. |
| Peer Learning Groups For specialists   | Assess the Peer Learning Group Program for specialists<br><br>Make recommendations for changes or a go/no go decision for the program to move forward. | Assess at midpoint in program Oct 2022<br><br>Assess at end of Program April 2023.<br><br>End of June 2023 go/no go decision.  | Engagement satisfaction of specialists increases<br><br>Specialists consider the program beneficial<br><br>Specialists agree that CalSTRS is focusing on their growth and development.  |
| Bridging gaps in leadership development related to Human Resource processes (such as: LOA, performance development, selection, etc.)<br><br>*Topics will be selected based off needs analysis findings | Perform needs analysis to determine process topics and gaps<br><br>Collaborate with HR Leaders to design, develop and implement solutions              | FY 2022-23 – Needs analysis, collaboration & design<br><br>FY 2023-24 – Partner w/HR SME’s for content development<br><br>FY 2024-25 – Launch development offerings based off analysis | Content and materials will align with our processes.<br><br>Surveys and Interviews will be used to determine if gaps were bridged related to identified process topics and gaps   |

| <b>Initiative</b><br><i>How can we bridge the gap between current and future outlook?</i> | <b>Key Activities</b><br><i>What steps do you need to take to meet the initiative?</i>  | <b>Deadline</b><br><i>When will it be completed?</i> | <b>Proposed Performance Indicators</b><br><i>How will we know we achieved our goal and what will success look like?</i>                  |
|---|---|--|--|
| Refresh and review mission critical activities  | Continued maintenance of organizational mission critical program<br><br>Checking in regularly with business areas to track action planning/ implementation<br><br>Manage the succession planning needs for mission critical                     | FY 2022-23   | Establish and maintain plans for mission critical positions to combat risks associated with mission critical positions                   |
| Leadership succession planning  | Closing out of HR Pillars project<br><br>Collecting feedback from Investments Branch pilot  | FY 2024-25   | Assess the potential of current staff to become future leaders to meet emerging needs  |
| Refresh of the workforce and succession planning SharePoint                               | Assess current files on SharePoint<br><br>Remove any outdated material<br><br>Redesign the WFP SharePoint site<br><br>Add any new/relevant items/documents  | FY 2022-23   | Users will be able to quickly and easily navigate the WFP SharePoint site in order to reach their desired outcomes                       |
| Build organizational change management program  | Research, intake, and design thinking<br>Design framework in alignment with organizational strategy<br>Build network of partnerships across the organization<br>Pilot the framework for feedback and refinement<br>Implement, rollout, evaluate | FY 2024-25   | Implementation and sustained use of a framework customized to CalSTRS that supports the organization through enterprise-wide transitions |

| <b>Initiative</b><br><i>How can we bridge the gap between current and future outlook?</i>    | <b>Key Activities</b><br><i>What steps do you need to take to meet the initiative?</i>  | <b>Deadline</b><br><i>When will it be completed?</i> | <b>Proposed Performance Indicators</b><br><i>How will we know we achieved our goal and what will success look like?</i>   |
|--|---|--|---|
| Evolve knowledge transfer and transition program site as self-service                        | Update existing content and design<br><br>Upload additional resources and tools<br><br>Pilot self-service site across the organization<br><br>Add site to Human Resources homepage<br><br>Reintroduce program to branch leaders as self-service | FY 2022-23   | Creation of a newly redesigned Knowledge Transfer and Transition SharePoint site to kick off the rollout of the evolved self-service program                                  |
| Support knowledge capturing for mission-critical roles                                       | Revise existing templates to align with Workforce Development needs<br><br>Equip Investment branch leaders with tools and resources as a pilot<br><br>Empower branches to capture knowledge for mission-critical roles                          | FY 2023-24   | Ongoing support for now; success will be determined at the pace in which support is needed and requested for mission-critical roles through Workforce and Succession Planning |
| Roll out evolved, self-service knowledge transfer and transition program to the organization | Implement org-wide communications and outreach plan<br><br>Conduct “know-shows” to preview tools available<br><br>Evaluate org-wide reach and usage   | FY 2024-25   | Sustained use of the evolved, self-service knowledge transfer program across the organization   |

## Appendix – Related Resources

Search for and access additional related resources via Central.

- Business Plan
- Career Ladders
- Career Services
- Competency Guide
- Diversity, Equity and Inclusion
- HR Link Learning Management System
- Knowledge Transfer & Transition
- Leadership Development
- Organizational Charts
- Recognition Program: Virtuosity
- Selection Process Guide
- Strategic Plan
- Talent Acquisition
- Training Services
- Upward Mobility



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ONE OF THE THINGS WE OFTEN MISS  
IN **SUCCESSION PLANNING** IS THAT IT  
SHOULD BE **GRADUAL AND THOUGHTFUL**,  
WITH LOTS OF **SHARING OF INFORMATION**  
AND **KNOWLEDGE AND PERSPECTIVE**, SO  
THAT IT'S ALMOST A **NON-EVENT** WHEN IT  
HAPPENS.

**ANNE M. MULCAHY,**

LEAD INDEPENDENT DIRECTOR, JOHNSON & JOHNSON;  
RETIRED CHAIRPERSON & CEO OF XEROX CORPORATION



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