

WORKFORCE PLAN 2018-22

HUMAN RESOURCES | DECEMBER 2019



WORLD-CLASS ORGANIZATIONS HAVE LEARNED THAT THEIR **COMPETITIVE EDGE** IS DRIVEN BY AN **INTEGRATED TALENT** MANAGEMENT STRATEGY FULLY ALIGNED WITH THE **BUSINESS'S MISSION** AND **VISION** AND MEANINGFULLY INCORPORATED INTO ITS **LONG-TERM STRATEGIC** PLANNING.

SCOTT E. MATTSON

TABLE OF CONTENTS

04

MESSAGE FROM DIRECTOR OF HR

05 / A Message from CalSTRS Director of HR

06

WORKFORCE PLAN

- 07 / Our Core Values
- 08 / Our Core Competencies
- 08 / Board Strategic Goals
- 09 / Strategy Map

10

WORKFORCE OVERVIEW

- 11 / Demographics
- 11 / Age
- 12 / Generation
- 13 / Retirement Risk
- 14 / Ethnicity
- 15 / Gender

17

WORKFORCE GAP ANALYSIS

17 / Gap Analysis

27

RECOMMENDATIONS

29

APPENDICES

- 29 / **Appendix I** - Accomplishments from Previous Plan
- 39 / **Appendix II** - Related Resources

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4



A MESSAGE FROM CALSTRS DIRECTOR OF HUMAN RESOURCES

The California State Teachers' Retirement System is pleased to present its Workforce Plan covering fiscal years 2018-22. The plan reflects CalSTRS' commitment to growing an engaged, highly skilled and diverse workforce. The underlying structure of the plan recognizes nearly 80 percent in accomplishments from the 82 recommendations initiated from the previous workforce plan. It also introduces six new strategic recommendations through data-driven examination of the current workforce and alignment with CalSTRS Strategic and Business Plans. CalSTRS recognizes that strategic planning is critical to meeting the workforce changes of the future and plays a vital role to the organization's success.

Human Resources' strategies continue to emerge as a top focus for strategic planning in support of the mission and business operations. Over the past few years, we have seen human resources process improvement efforts in state government, changes in California demographic population and an increasingly competitive labor market.

State government is evolving with a focus on creating a modern human resource system through the Civil Service Improvement effort. CalSTRS has partnered with other state departments to create efficiencies for state recruitment and learning and development processes with the intent to improve the candidate and employee experience in growing a career with state government. This workforce transformation has provided insight to CalSTRS and methodologies to enhance our human resources strategies.

CalSTRS is dedicated to sustaining and investing in the development of our most valuable asset, our employees, to continue to build a strong, adaptable and diverse workforce to serve our members, California's educators.

MELISSA NORCIA

Director of Human Resources

WORKFORCE PLAN

In support of Strategic Goal 4: Workforce Transformation, to “grow an engaged, highly skilled and diverse workforce,” the CalSTRS Workforce Plan is a high level analysis of the organization’s workforce to address current and future needs. In alignment with the CalSTRS mission, vision and core values, it is the purpose of Human Resources to support the total operation in meeting its goals through its most valuable resource—its PEOPLE. As a division we are committed to building a successful and sustainable workforce of engaged employees.

This Workforce Plan is an updated version of the 2013-17 Workforce Strategy Plan. Included in this version is a review of the objectives established in the original plan and the many and varied accomplishments CalSTRS has achieved in the intervening years.

Organization Overview

The California State Teachers’ Retirement System was established by law in 1913 to provide retirement benefits to California’s public school educators from prekindergarten through community college.

CalSTRS, with a portfolio valued at \$208.7 billion as of June 30, 2017, is the largest educator-only pension fund in the world. CalSTRS administers a hybrid retirement system, consisting of traditional defined benefit, cash balance and voluntary defined contribution plans. CalSTRS also provides disability and survivor benefits. CalSTRS serves California’s 914,000 public school educators and their families from the state’s 1,700 school districts, county offices of education and community college districts.

Workforce Planning—the CalSTRS Approach

What is workforce planning?

Workforce planning is a systematic process that is integrated, methodical and ongoing and that involves the collection and analysis of past workforce patterns to prepare forecasts and develop recruitment, retention and succession strategies.

Workforce planning is a dynamic and continuous process that extends beyond leadership succession to encompass all of the organization’s staffing needs, now and in the future.

Why is workforce planning important?

Workforce planning enables an organization to proactively plan for and address changes in its strategic direction and the human capital required to meet organizational goals. The ultimate goal of workforce planning is to ensure that the organization has the right number of people with the right skills in the right jobs at the right time.

What is involved?

The process includes determining the number of workers and types of skills needed, where and when they will be needed and innovative strategy development to meet these requirements. Workforce planning endeavors center around assessment of organizational workforce readiness and response to the ongoing operational and strategic needs of the organization. This effort is accomplished through activities such as recruitment, training, performance management, staff development, retention and organizational knowledge management to support the mission and goals of the organization.

CalSTRS workforce planning expertise

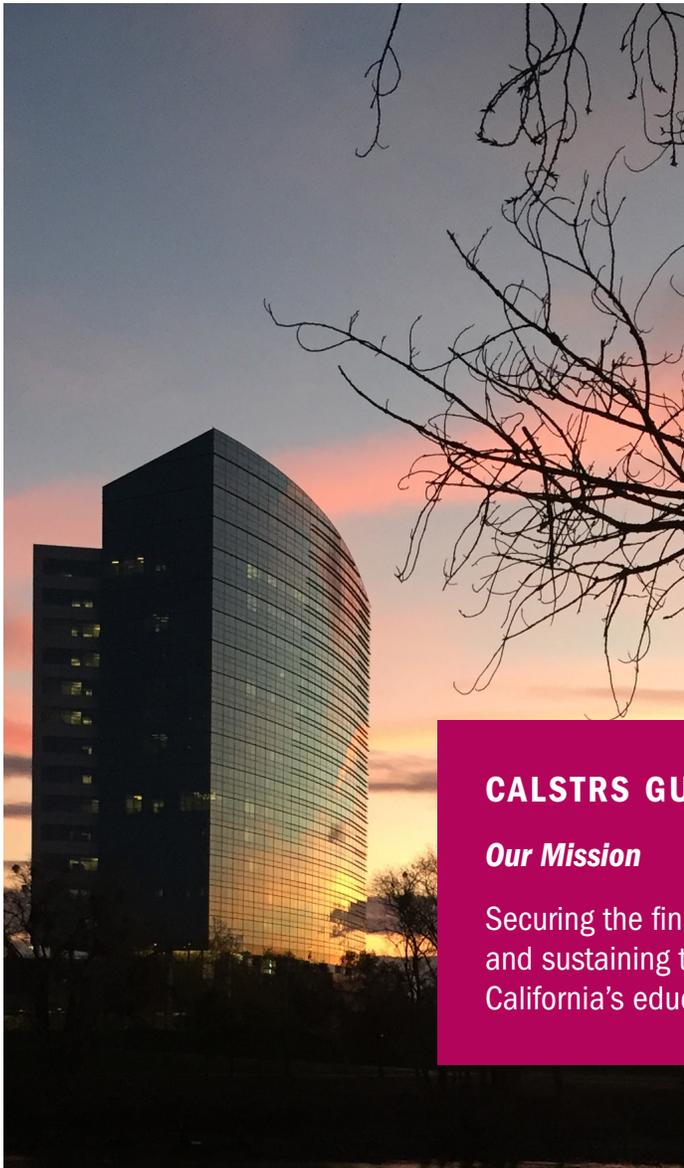
As early adopters of workforce planning principles and processes, CalSTRS has been recognized as progressive thought leaders within California state civil service. Following an audit of workforce planning efforts at the state level in May 2015, CalSTRS Chief Operating Officer, was invited to present the CalSTRS Workforce and Leadership Development and Succession Plans to the California State Legislature as an example of how workforce planning can be done successfully with support from leadership. CalSTRS Human Resources leaders and staff have been invited to present and/or serve as subject matter experts at the statewide level by the California Department of Human Resources and have participated on several of the Civil Service Improvement project teams. These collaborative efforts led to the creation of tools and training for statewide application of workforce and succession planning which have been implemented through policy statewide. Our plans, tools and recommendations are available at CalHR’s statewide workforce planning website.

Purpose

The CalSTRS Workforce Plan provides a high level view from which each CalSTRS employee can better understand the major workforce-based challenges the organization will face in alignment with ongoing mission critical activities and the future direction of the organization.

Over the next five years, and beyond, HR will continue to lead and engage with leadership and staff on workforce planning activities.

Each branch within the organization will be involved in developing and realizing solutions to recruit, retain, manage performance, develop staff and mitigate organizational knowledge management issues in order to best meet the demands of each branch's unique business need.



OUR CORE VALUES

The CalSTRS core values are a set of attitudes, beliefs and behaviors that define CalSTRS and its employees.

CUSTOMER SERVICE

We never compromise on quality as we strive to meet or exceed the expectations of our customers.

ACCOUNTABILITY

We operate with transparency and accept responsibility for our actions.

LEADERSHIP

We model best practices in our industry and innovate to achieve higher standards.

STRENGTH

We ensure the strength of our system by embracing a diversity of ideas and people.

TRUST

We conduct ourselves with integrity, acting ethically in every endeavor.

RESPECT

We respect the needs of our members, co-workers, and others, treating everyone with fairness, honesty and courtesy.

STEWARDSHIP

We recognize our fiduciary responsibility as the foundation for all decision-making.

CALSTRS GUIDING PRINCIPLES

Our Mission

Securing the financial future and sustaining the trust of California's educators.

Our Vision

*Your Reward—A secure retirement
Our Reward—Getting you there*

OUR CORE COMPETENCIES

The CalSTRS core competencies are the five competencies that focus groups and the executive staff determined are necessary, throughout the organization, for success. Competencies are a set of defined behaviors that provide a structured guide enabling the identification, evaluation and development of the behaviors in individual employees.

Adaptability/Flexibility

Adapts well to changes in assignments and priorities. Adapts behavior or work methods in response to new information, changing conditions, or unexpected obstacles. Approaches change positively and adjusts behaviors accordingly.

Communication

Clearly conveys and receives information and ideas, through a variety of media, to and from individuals and groups in a manner that engages the listener, helps them understand and retain the message, and invites response and feedback. Keeps others informed as appropriate. Demonstrates applicable job-related written, oral, listening and interpersonal skills.

Customer/Client Focus

Identifies and responds to current and future client needs and provides excellent service to internal and external clients.

Teamwork

Participates as an active and contributing member of a team to achieve team goals. Works cooperatively with other team members, involves others, shares information as appropriate and shares credit for team successes.

Work Standards/Quality Orientation

Sets high quality work standards and well-defined, realistic goals for one's self. Displays a high level of effort and commitment towards completing assignments in a timely manner with thoroughness and accuracy. With minimal supervision, monitors and checks work to assure it meets standards. Is motivated to achieve.

BOARD STRATEGIC GOALS

GOAL 1: FINANCIAL

Ensure a financially sound retirement system.

GOAL 2: MEMBER/EMPLOYER

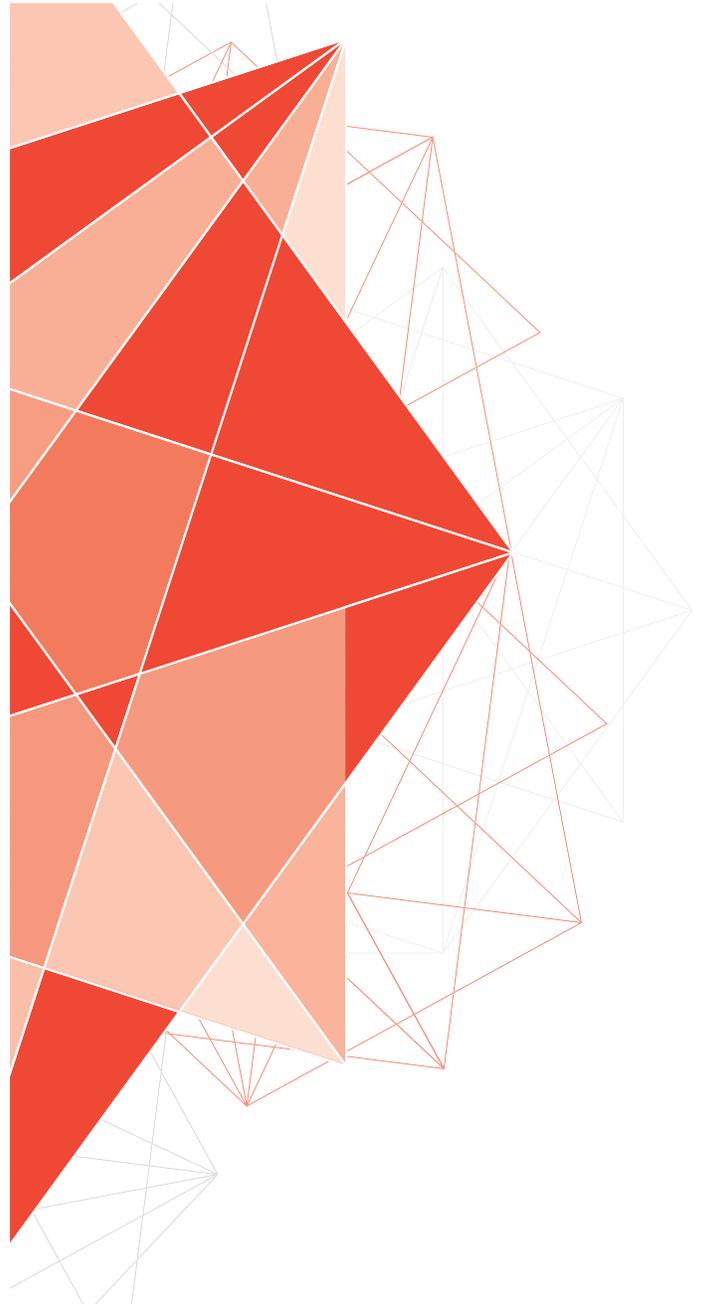
Enhance services to members and employers.

GOAL 3: BUSINESS TRANSFORMATION

Drive operational excellence.

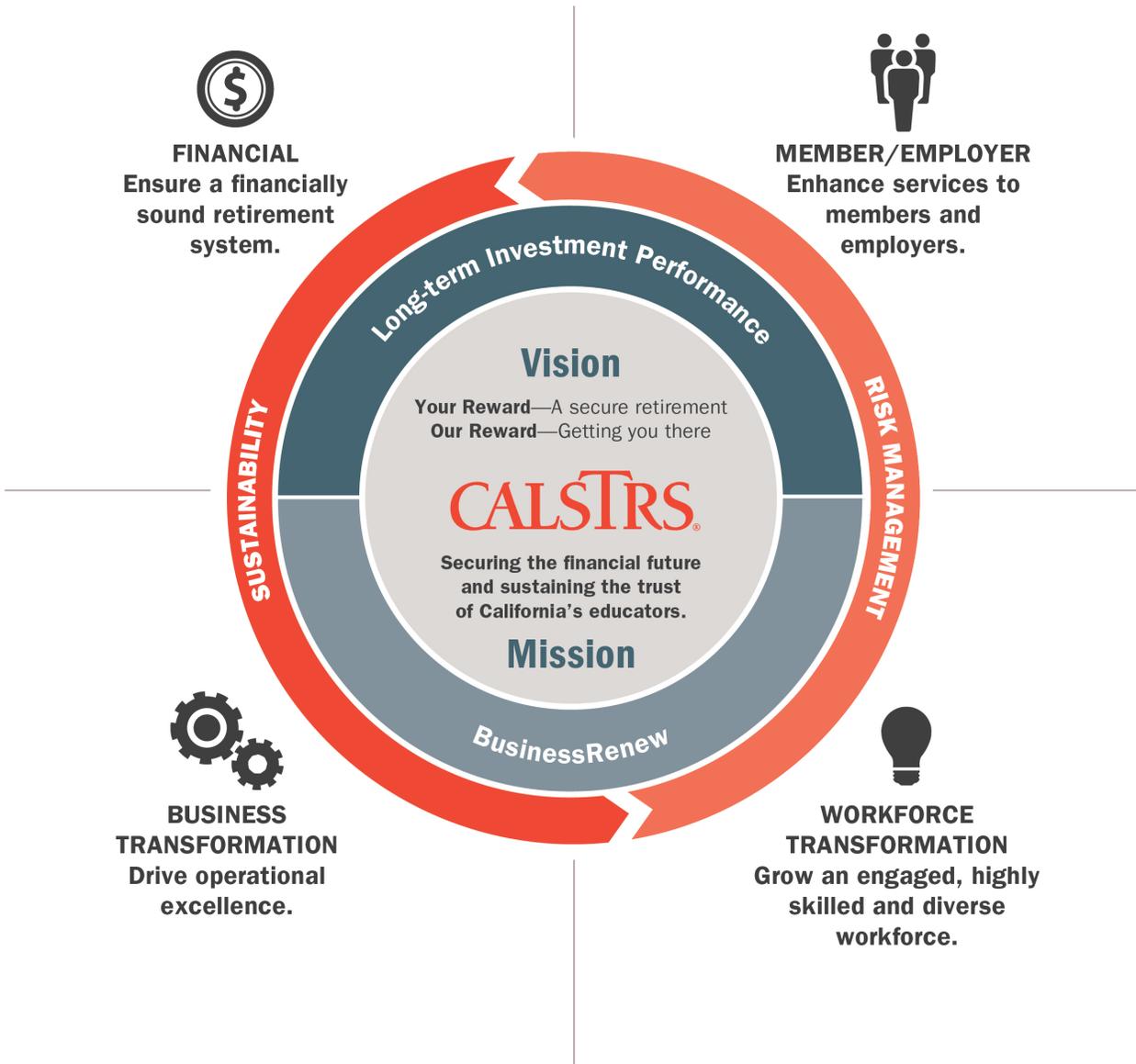
GOAL 4: WORKFORCE TRANSFORMATION

Grow an engaged, highly skilled and diverse workforce.



STRATEGY MAP

The strategy map below is a visual description of how the four strategic goals interrelate with each other in support of the CalSTRS mission and vision.



WORKFORCE OVERVIEW

Current Workforce Profile

The workforce snapshot below provides an overview of the CalSTRS workforce. As of December 30, 2017, CalSTRS has 1158 total filled positions, up from 845 in 2013. All benefits-related member facing staff is now under the Benefits and Services Branch umbrella, including decentralized Member Service Center staff.

The CalSTRS support branches, such as Technology Services and Administrative Services, also have grown to continue support for CalSTRS staff, stakeholders and systems. The average age of CalSTRS staff is 42, which is younger compared to the average age of 48 within the greater State of California civil service workforce. Staff has, on average, 8.57 years of state service while Leadership has, on average, 14.88 years of service. CalSTRS currently has a staff to leader ratio of approximately four to one (includes specialists as staff).

EMPLOYEE COUNT AND YEARS OF STATE SERVICE

14.88 YEARS

AVERAGE LENGTH OF STATE SERVICE—LEADERSHIP

8.57 YEARS

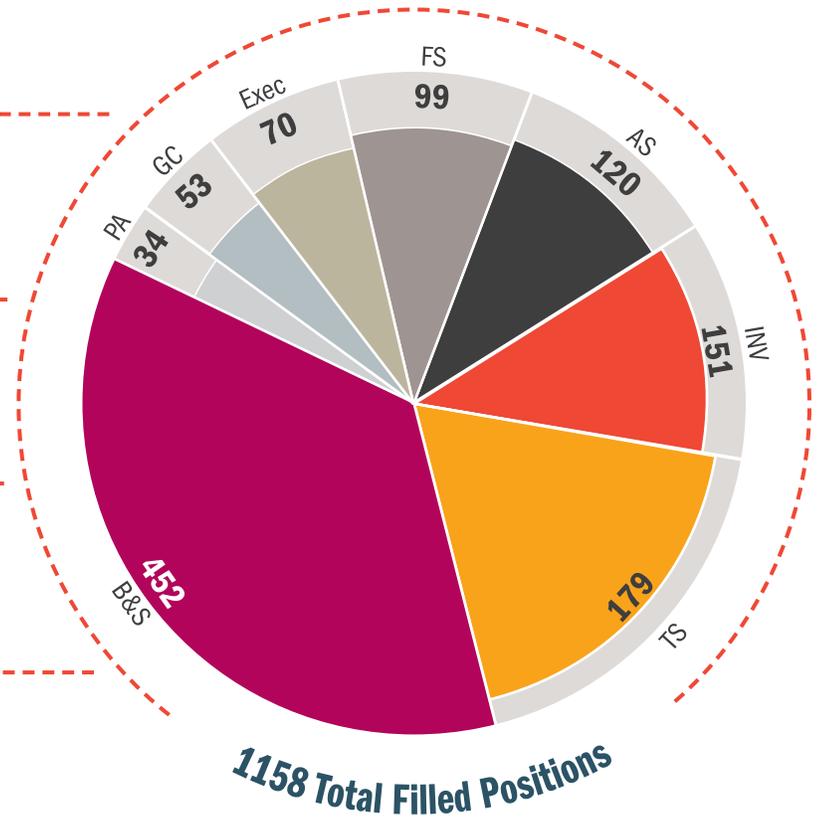
AVERAGE LENGTH OF STATE SERVICE—STAFF

240

OF LEADERSHIP POSITIONS

918

OF STAFF POSITIONS (INCLUDES SPECIALISTS)



AS OF 12/30/17

DEMOGRAPHICS

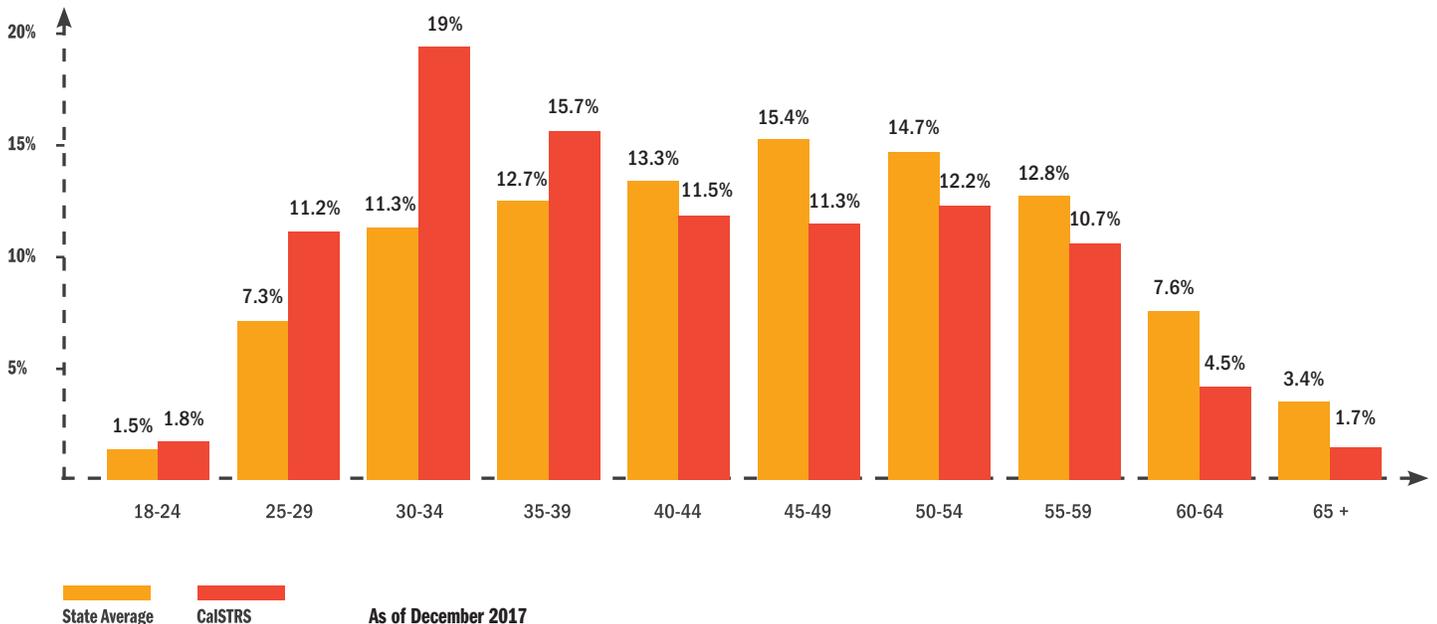
CalSTRS has a mix of employees representing various age groups, generations and ethnicities. Although each employee is an individual with their own influencers, traits and values, generational descriptors can be used as high-level generalizations for understanding the differences between generational groups and why barriers to communication may exist. It should be noted that general descriptors, or stereotypes, for any group of people are sensitive and should not be assumed as factual.

Demographic differences are advantageous to the organization because they influence the way one thinks and approaches problem solving. Diversity of thought leads to innovative solutions to historical problems; greater efficiency; happier, healthier, more productive, more engaged employees; and a more successful CalSTRS.

Age

CalSTRS has an even distribution of age groups. As indicated in the chart below, CalSTRS staff is younger on average than the greater State of California civil service workforce. The larger than average groups between 25 and 39 years of age in our organization will serve us well as people retire because we have a larger than average talent pool to draw from for succession planning purposes.

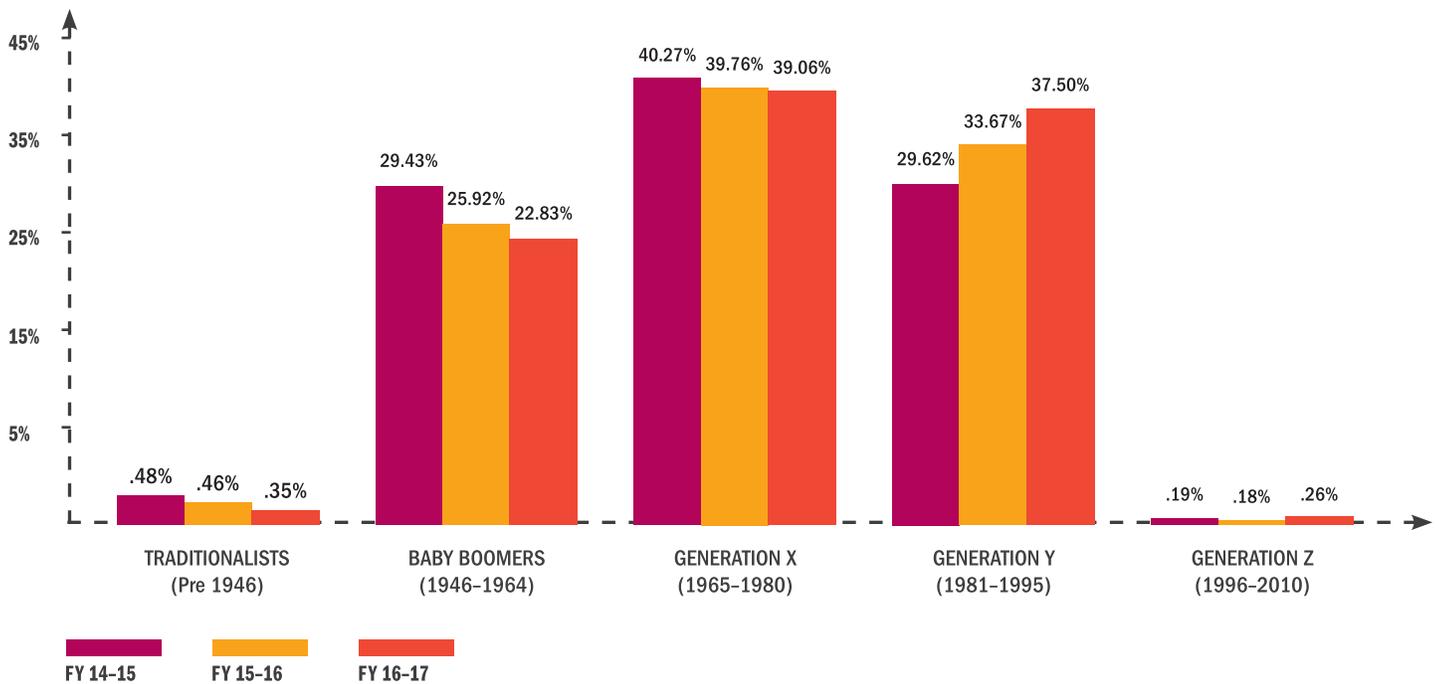
AGE DEMOGRAPHICS (CALSTRS vs. STATE SERVICE)



Generation

As shown in the chart below, CalSTRS workforce has been getting younger over the past several years, which is expected given Baby Boomers have now reached retirement age. We now have more staff in each of the categories Generation X or Y than Baby Boomer. Additionally, in this update to the plan we are introducing Generation Z—born between 1996 and 2010, the oldest Generation Zers turned 21 in 2017 and are entering the workforce at a rapid pace. Not much is known yet about Generation Z and their work ethic and preferred work methods. However, as true digital natives having grown up with cell phones and computers as nearly ubiquitous parts of their lives, effective, mobile and highly customizable technology is important to them.

GENERATIONS



Note: New and developing research on the generations currently in the workforce has identified Generation Z as separate from Generation Y. Generation Y now spans birth years 1981-1995, and Generation Z spans birth years 1996-2010. Generation X spans 1965-1980, Baby Boomer spans 1946-1964, and Traditionalist is pre-1946.

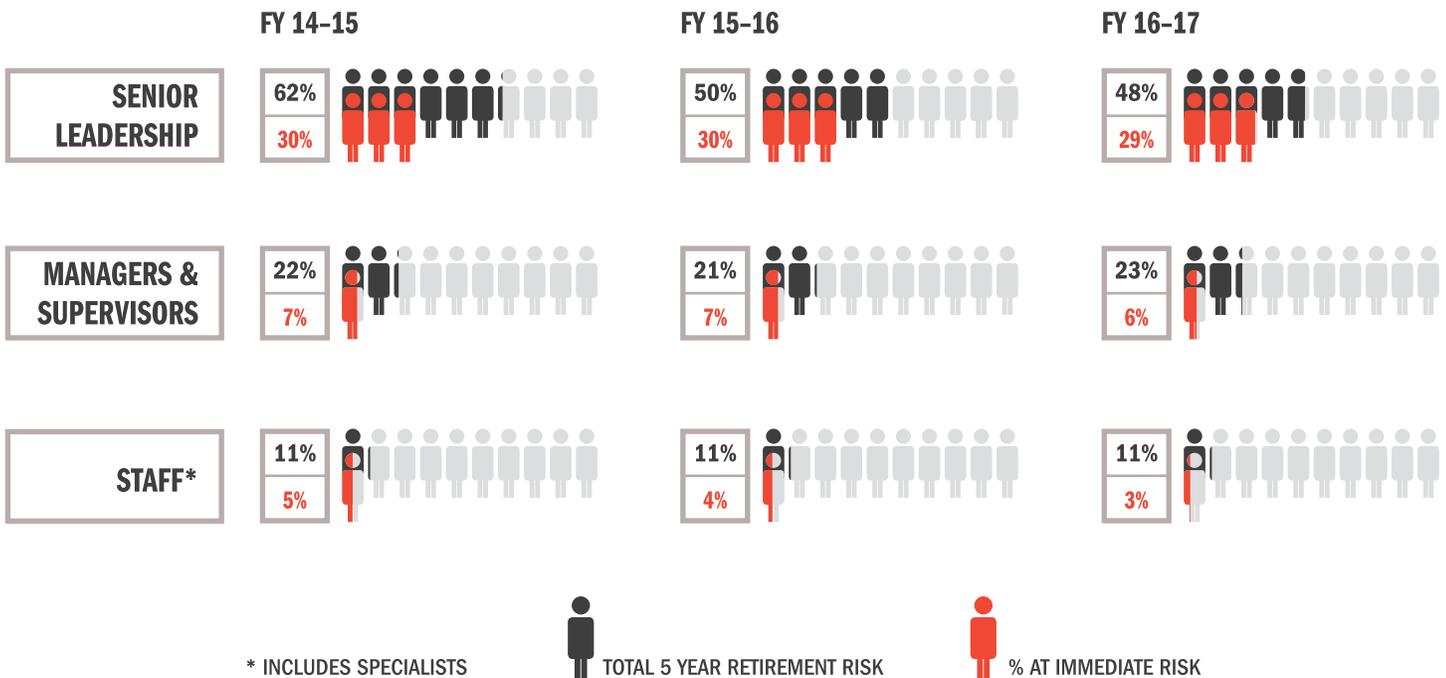
Retirement Risk

Retirement risk is calculated using a simple formula of age and years of service in the civil service workforce. In state service, for those hired before 1/1/2013, individuals are fully vested for retirement and eligible for full healthcare benefits if they are at least 55 years of age with at least 20 years of service. Individuals who currently meet both the age and the years of service requirements are considered an immediate retirement risk. Individuals who are 50 or older and have at least 15 years of service are considered a five-year retirement risk. Due to the Public Employees' Pension Reform Act there are additional or different risk calculations required for those hired after 1/1/2013. The number of employees affected by PEPRRA does not affect the CalSTRS overall risk yet. In future iterations of this document, this challenge will be more deeply examined.

CalSTRS overall retirement risk has decreased as those identified as a retirement risk in our workforce have retired over the past several years. As of 6/30/2017, the senior leaders (L4 and above) were at a 29 percent immediate risk and 48 percent risk over the next five years. The manager/supervisor (L1, L2 and L3) group has six percent immediate risk and 23 percent risk over the next five years. The staff group (including represented staff and specialists) has only three percent immediate risk and 11 percent five-year retirement risk.

The senior leader group will always be our most concerning group for retirement risk by nature of the depth and breadth of experience typically required of senior leader positions. It is also the smallest employee group so the average age is not normalized and the risk is more obvious.

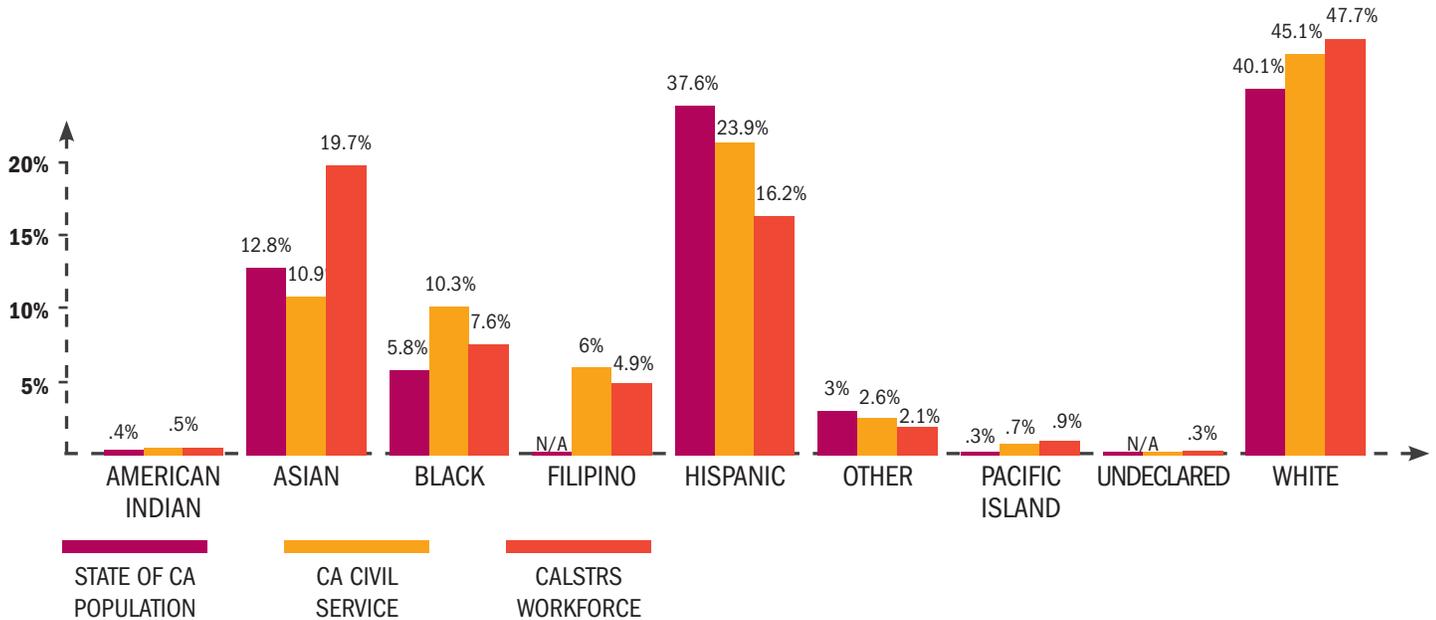
CALSTRS RETIREMENT RISK



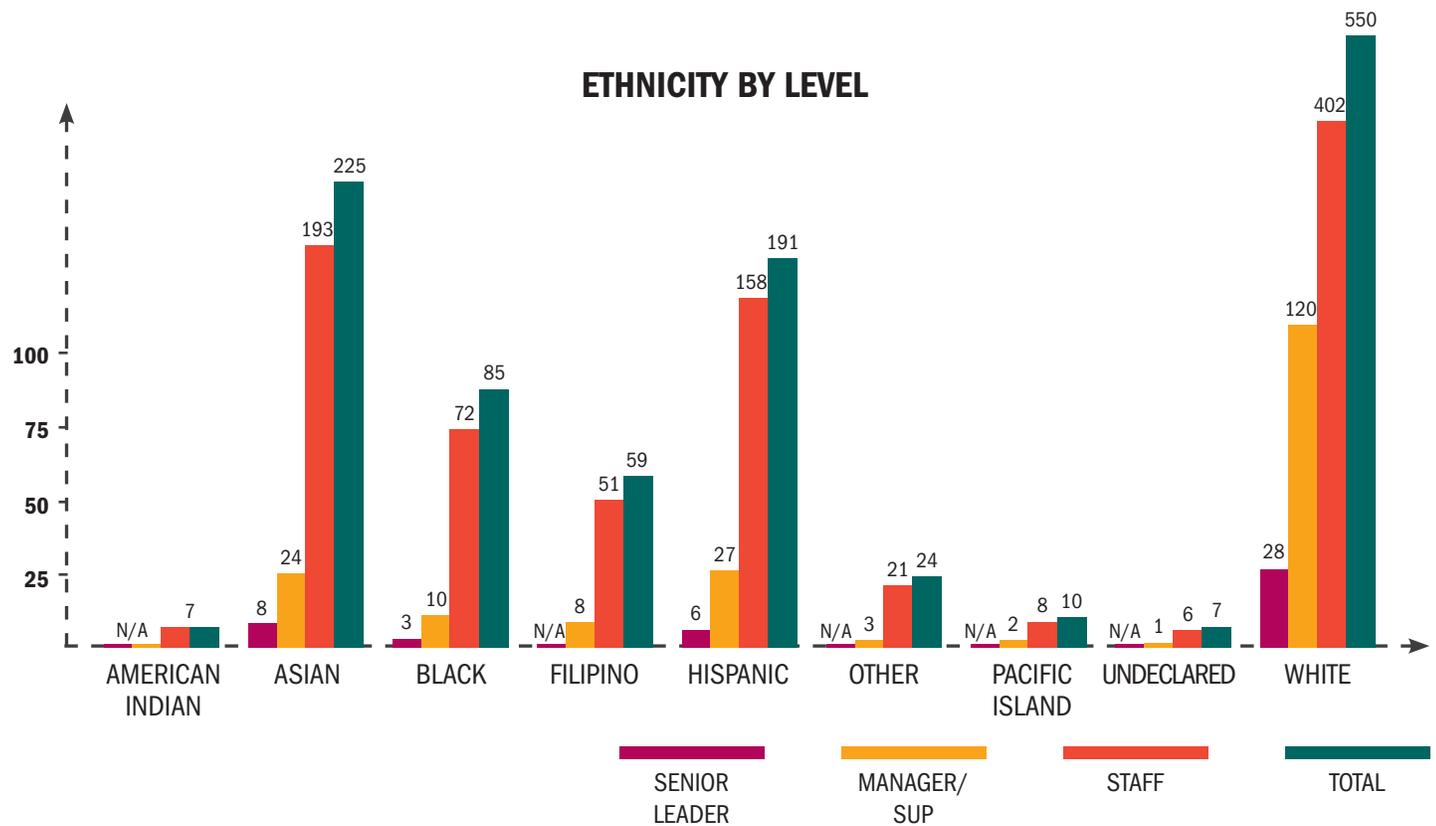
Ethnicity

Our staff reflects the ethnic makeup of the greater population of California. Our manager/supervisor, staff/specialist and senior leader groups are all predominantly white, which outpaces the greater California population. Staff members who identify as Asian or as black are both larger percentages of our workforce than either group in the broader population of California.

CALSTRS ETHNICITY VS. STATE POPULATION & CIVIL SERVICE WORKFORCE



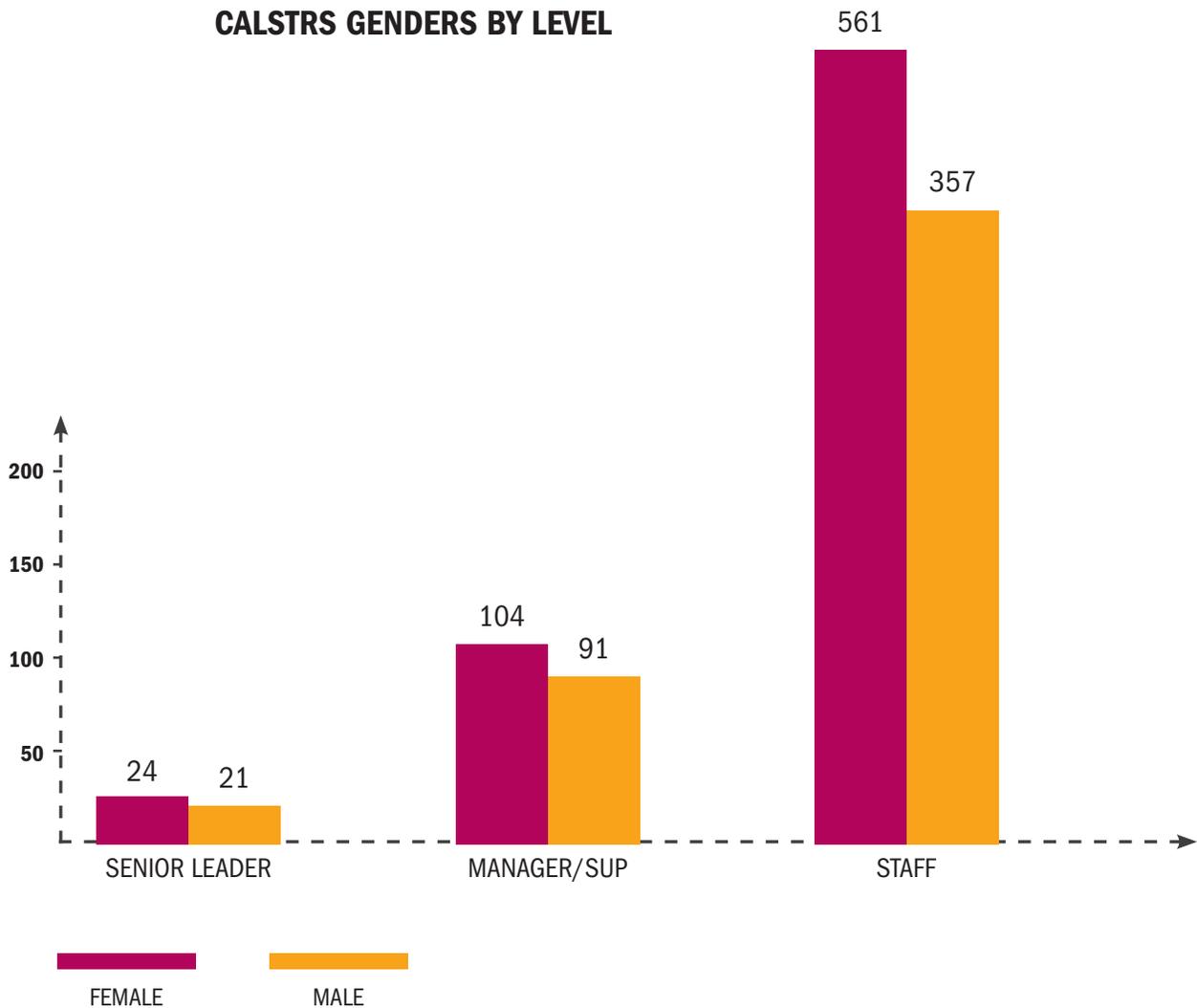
ETHNICITY BY LEVEL



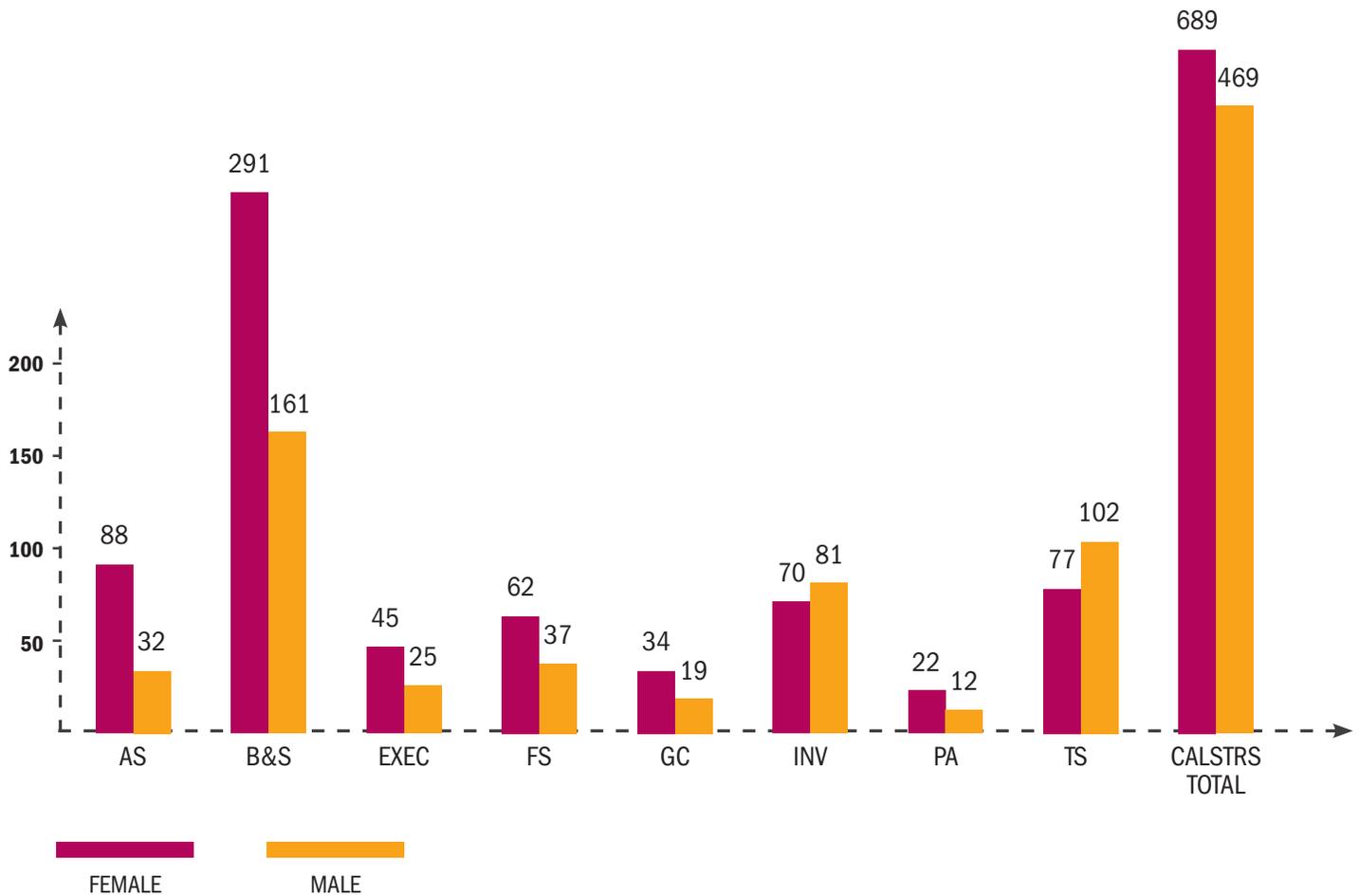
Gender

There are more females than males at CalSTRS. Although the state population of California reflects a 50.3 percent to 49.7 percent ratio of females to males, CalSTRS has a ratio of 59.8 percent females to 40.2 percent males. Gender data for the greater state civil service workforce shows that the State of California employs 53.5 percent males and 46.5 percent females.

As you can see in the chart on the following page, Technology Services and Investments branches, both male-dominated industries historically, have more males than females. Conversely, the Administrative Services branch, historically a female-dominated industry, is heavily weighted toward female employees. Although our senior leader group has 52.4 percent male and 47.6 percent female, this breakdown does not reflect the CalSTRS workforce makeup. Our membership is 70 percent female and 30 percent male.



CALSTRS GENDERS BY BRANCH AND ORG.



Demographic Challenges

Some of the demographic challenges that became apparent after doing an analysis of CalSTRS current workforce:

- Senior leader retirement risk—48 percent of our senior leaders are eligible for retirement within the next five years.
- Leadership diversity—our leadership team does not reflect the same rich ethnic diversity seen in our staff.
- Work/life balance—needs differ by individual lifestage: aging parents, young children, career-building, home-buying, empty—nesting, transitioning to retirement, etc.
- Technology—as more digital natives are hired (people for whom computers have always been part of their lives), maintenance of legacy systems (typically utilizing older technology) may make recruitment and retention of quality talent more difficult.

WORKFORCE GAP ANALYSIS

Future Workforce Profile

As CalSTRS focuses on modifications and replacements of technological systems, contingency or contract staff will increase. These increases in staffing will continue to impact space usage, support function needs and costs involved with successfully recruiting, onboarding and training new members of the workforce.

As the world we work in gets more technologically advanced, there is a continuous concern about keeping up with the rapidly changing technology landscape. We will need employees experienced with many types of new or emerging technologies and our systems will need to keep pace. We need more people with the ever-present demand for better technology, and those skilled to use and/or build it.

However, focus also should be given to the inclusivity and engagement of all employees with varied needs who require work/life balance. More than age, generation or other factors, the life stages that most people go through affect us all at different times. We need to ensure our employees have the flexibility to make both work and home life successful. Whether the need is flexible scheduling when caring for young children or aging parents, or time off to sign the paperwork to close on a new home, or myriad other possibilities, we need to ensure that we have the agility and willingness to accommodate the impacts to our people at all life stages.

Workforce Gaps

In the 2013-17 version of CalSTRS Workforce Strategy Plan, it was estimated that at a minimum CalSTRS would need to hire 544 people and at a maximum (estimating potential retirements) would need to hire 617. In reality, because we have undertaken massive technology projects in the intervening years, we have filled 752 positions.

Based on turnover trends over the past five years the estimated minimum number of staff we will need to hire is 632 over the next five years. There is no way to know how many contingency or temporary staff to expect so these numbers could potentially rise as evidenced by the total number hired in the preceding five-year period.

Because CalSTRS has a younger trending workforce make up than other state agencies and a lengthy history of steady retirement numbers, we adjusted our calculations for the workforce gap analysis to include retirements as part of turnover instead of predicting retirements based on retirement risk.

The gap analyses were done using a five-year scale. The five-year scale matches our retirement risk calculations and normalizes turnover for more effective calculations.

5 YEAR WORKFORCE GAP ANALYSIS: CALSTRS		
Filled Positions (as of 6/30/18)	1154	
Authorized Positions (FY17/18 - 21/22)	89	
Vacancies (as of 6/30/18)	120	+
Total # of Staff Required (Demand)	1363	
Projected 5 Year Turnover		
Filled Positions (as of 6/30/18)	1154	
Projected 5 Year Turnover	423	—
Total Projected Internal Supply	731	
Total # of Staff Required		
Total # of Staff Required	1363	
Total Projected Internal Supply	731	—
Total Gap in Staffing due to Turnover	632	

CALSTRS has 1154 filled positions, 89 new positions to be added between fiscal years 2017-18 and 2021-22, 120 vacancies and expected turnover of 423 people over the next five years.

It is anticipated that CalSTRS will need to make at least 632 hires over the next five years.

LEGEND:

Filled Positions: A point-in-time number of filled positions for a baseline starting point

Authorized Positions: New budgeted positions approved by the Teacher's Retirement Board, to be added over 5 years (FY 17/18 through 21/22)

Vacancies: A point-in-time number of vacant positions for a baseline starting point

Total # of Staff Required (Demand): The number of people the organization will need to be fully staffed over the next five years

Projected 5 Year Turnover: Anticipated turnover over the next five years, based on the actual turnover of all separations during calendar years 2013-17.

Total Projected Internal Supply: The anticipated number of employees remaining with the organization over the next five years, after accounting for expected turnover

Total Gap in Staffing due to Turnover: The difference between the number of employees required to be fully staffed (demand) and the anticipated number of employees remaining with the organization over the next five years, after accounting for expected turnover (supply)

5 YEAR WORKFORCE GAP ANALYSIS: ADMINISTRATIVE SERVICES		
Filled Positions (as of 6/30/18)	124	
Authorized Positions (FY17/18 - 21/22)	4	
Vacancies (as of 6/30/18)	14	+
Total # of Staff Required (Demand)	142	
Filled Positions (as of 6/30/18)	124	
Projected 5 Year Turnover	54	—
Total Projected Internal Supply	70	
Total # of Staff Required	142	
Total Projected Internal Supply	70	—
Total Gap in Staffing due to Turnover	72	

The **ADMINISTRATIVE SERVICES BRANCH** has 124 filled positions, four new positions to be added between fiscal years 2017-18 and 2021-22, 14 vacancies and expected turnover of 54 people over the next five years.

It is anticipated that the Administrative Services Branch will need to make at least 72 hires over the next five years.

5 YEAR WORKFORCE GAP ANALYSIS: BENEFITS & SERVICES		
Filled Positions (as of 6/30/18)	451	
Authorized Positions (FY17/18 - 21/22)	13	
Vacancies (as of 6/30/18)	44	+
Total # of Staff Required (Demand)	508	
Filled Positions (as of 6/30/18)	451	
Projected 5 Year Turnover	186	—
Total Projected Internal Supply	265	
Total # of Staff Required	508	
Total Projected Internal Supply	265	—
Total Gap in Staffing due to Turnover	243	

The **BENEFITS & SERVICES BRANCH** has 451 filled positions, 13 new positions to be added between fiscal years 2017-18 and 2021-22, 44 vacancies and expected turnover of 186 people over the next five years.

It is anticipated that the Benefits & Services Branch will need to make at least 243 hires over the next five years.

5 YEAR WORKFORCE GAP ANALYSIS: EXECUTIVE		
Filled Positions (as of 6/30/18)	68	
Authorized Positions (FY17/18 - 21/22)	0	
Vacancies (as of 6/30/18)	5	+
Total # of Staff Required (Demand)	73	
Filled Positions (as of 6/30/18)	68	
Projected 5 Year Turnover	19	—
Total Projected Internal Supply	49	
Total # of Staff Required	73	
Total Projected Internal Supply	49	—
Total Gap in Staffing due to Turnover	24	

The **EXECUTIVE BRANCH** has 68 filled positions, five vacancies and expected turnover of 19 people over the next five years.

It is anticipated that the Executive Branch will need to make at least 24 hires over the next five years.

5 YEAR WORKFORCE GAP ANALYSIS: FINANCIAL SERVICES		
Filled Positions (as of 6/30/18)	93	
Authorized Positions (FY17/18 - 21/22)	5	
Vacancies (as of 6/30/18)	10	+
Total # of Staff Required (Demand)	108	
Filled Positions (as of 6/30/18)	93	
Projected 5 Year Turnover	52	—
Total Projected Internal Supply	41	
Total # of Staff Required	108	
Total Projected Internal Supply	41	—
Total Gap in Staffing due to Turnover	67	

The **FINANCIAL SERVICES BRANCH** has 93 filled positions, five new positions to be added between fiscal years 2017-18 and 2021-22, 10 vacancies and expected turnover of 52 people over the next five years.

It is anticipated that the Financial Services Branch will need to make at least 67 hires over the next five years.

5 YEAR WORKFORCE GAP ANALYSIS: GENERAL COUNSEL		
Filled Positions (as of 6/30/18)	51	
Authorized Positions (FY17/18 - 21/22)	8	
Vacancies (as of 6/30/18)	6	+
Total # of Staff Required (Demand)	65	
Filled Positions (as of 6/30/18)	51	
Projected 5 Year Turnover	14	—
Total Projected Internal Supply	37	
Total # of Staff Required	65	
Total Projected Internal Supply	37	—
Total Gap in Staffing due to Turnover	28	

The **GENERAL COUNSEL BRANCH** has 51 filled positions, eight new positions to be added between fiscal years 2017-18 and 2021-22, six vacancies and expected turnover of 14 people over the next five years.

It is anticipated that the General Counsel Branch will need to make at least 28 hires over the next five years.

5 YEAR WORKFORCE GAP ANALYSIS: INVESTMENTS		
Filled Positions (as of 6/30/18)	155	
Authorized Positions (FY17/18 - 21/22)	59	
Vacancies (as of 6/30/18)	15	+
Total # of Staff Required (Demand)	229	
Filled Positions (as of 6/30/18)	155	
Projected 5 Year Turnover	33	—
Total Projected Internal Supply	122	
Total # of Staff Required	229	
Total Projected Internal Supply	122	—
Total Gap in Staffing due to Turnover	107	

The **INVESTMENTS BRANCH** has 155 filled positions, 59 new positions to be added between fiscal years 2017-18 and 2021-22, 15 vacancies and expected turnover of 33 people over the next five years.

It is anticipated that the Investments Branch will need to make at least 107 hires over the next five years.

5 YEAR WORKFORCE GAP ANALYSIS: PUBLIC AFFAIRS		
Filled Positions (as of 6/30/18)	34	
Authorized Positions (FY17/18 - 21/22)	0	
Vacancies (as of 6/30/18)	3	+
Total # of Staff Required (Demand)	37	
Filled Positions (as of 6/30/18)	34	
Projected 5 Year Turnover	9	—
Total Projected Internal Supply	25	
Total # of Staff Required	37	
Total Projected Internal Supply	25	—
Total Gap in Staffing due to Turnover	12	

The **PUBLIC AFFAIRS BRANCH** has 34 filled positions, 3 vacancies and expected turnover of 9 people over the next five years.

It is anticipated that the Public Affairs Branch will need to make at least 12 hires over the next five years.

5 YEAR WORKFORCE GAP ANALYSIS: TECHNOLOGY SERVICES		
Filled Positions (as of 6/30/18)	178	
Authorized Positions (FY17/18 - 21/22)	0	
Vacancies (as of 6/30/18)	23	+
Total # of Staff Required (Demand)	201	
Filled Positions (as of 6/30/18)	178	
Projected 5 Year Turnover	56	—
Total Projected Internal Supply	122	
Total # of Staff Required	201	
Total Projected Internal Supply	122	—
Total Gap in Staffing due to Turnover	79	

The **TECHNOLOGY SERVICES BRANCH** has 178 filled positions, 23 vacancies and expected turnover of 56 people over the next five years.

It is anticipated that the Technology Services Branch will need to make at least 79 hires over the next five years.

COMPETENCY GAPS:

In addition to the numerical gap analysis, CalSTRS has been tracking year-over-year ratings from probationary reports and Annual Performance Reviews in an effort to identify competency gaps within the organization. The lowest rated leader competencies have been Communication, Risk Management and Strategic Thinking. This has been a consistent trend through all levels of leadership. Communication also has been a constant in the lowest rated competencies for staff. These results have been affirmed by feedback from the All-Staff Engagement survey results.

Through client team meetings, quarterly Operations Performance Reviews, Administrative Branch Business Review Business Plan updates, and the annual State of CalSTRS Workforce presentation, HR has been reporting on these measurements and discussing strategies to raise awareness and mitigate risk.

Some gaps that have been identified by comparing our current workforce profile to our projected needs include:

Retention gaps:

- Inclusivity of CalSTRS culture
- Work/life balance trade-offs
- Attrition and reintroduction of project staff back into the production workforce once technology projects are complete
- Thriving labor market squeezing available talent pool

Recruitment gaps:

- Standardized, collaborative process between HR and hiring managers
- Online recruitment process with mobile access functionality
- Recruitment plans focused on ideal candidate profile

- Established hiring strategies that include recognized best practices
- Robust outreach program supported organization-wide by business area SMEs

Succession planning gaps:

- Technology gaps making mission critical position mapping arduous
- Inability to effectively track and identify potential successors or high performers
- Education of knowledge transfer, transition, recruitment plans for high level or mission-critical positions
- Manual processes to track and maintain learning and development records that are not aligned timely with performance management information

Implications

The implications detailed in this section are in response to the gaps itemized above and take into account multiple feedback mechanisms such as All-Staff Engagement and Satisfaction Surveys, Onboarding Surveys, Exit Surveys and interviews, and the Diversity and Inclusion Survey.

Retention gaps:

Retention is the least costly way to manage a workforce that has already been recruited, onboarded, developed and engaged. Retention is key to successful succession planning. If seasoned staff with industry and business area knowledge leave, there will be gaps to fill in critical positions. Using calculations recommended by the Society for Human Resources Management, the average CalSTRS employee lost to turnover costs the organization \$8,500. This calculation does not include all of the associated loss-of-productivity costs that are dependent on how long the position remains vacant. With an average of 80 employees leaving the organization each year, the direct costs of that turnover total \$680,000 annually.

Surveys have revealed that there are pockets of perception of a current lack of inclusivity and communication at CalSTRS that will make growing/expanding diversity-and-inclusion efforts challenging. This perception can be seen in the engagement survey scores for communication. CalSTRS is implementing strategies to alleviate by identifying and implementing key drivers of engagement initiatives.

Inflexibility around work/life balance also may cause disengagement. It is important that communication between managers and staff is open and regular so that allowances can be made or negotiated for each individual's unique needs, while balancing the business needs of the organization.

A large workforce of staff is assigned to the Pension Solution project. Additionally, many of the project staff are contractors who are not CalSTRS employees. They represent a large workforce that is difficult to include in organizational culture, including workforce, workspace and succession planning. Many of the staff are classified

as manager/specialists, or non-supervisory managers, and are considered experts in their field. At the conclusion of the projects there will be many highly skilled people reentering our traditional organizational structure. These are highly valuable employees that now require skill gap analysis and training if they are to be put into leadership roles or reskilled for reassignment. Specialists, who are sharing the same classifications as supervisors, but not directly managing staff, will be reentering the established organizational structures. Most contractors will leave, some will stay on as contractors, and some will likely become state employees as they have seen with other large technology projects.

Recruitment gaps:

During recruitment, we have an opportunity to make a strong first impression on potential candidates. If not done thoughtfully, a poor candidate experience impacts CalSTRS reputation and ability to attract future candidates. During the recruitment and outreach phase and especially for those first impressions, presenting our worthy employer brand and managing the candidate experience is crucial. In the past several years we have made strides toward a great candidate experience that includes implementing best practices in recruitment and selection. The success of our organization's positive changes in the recruitment process is evidenced by a reduction in the time it takes to fill vacancies, and in increased quality of hires based on a reduction in involuntary turnover.

VACANCY RATES:

16/17 - 10.10%

15/16 - 9.31%

14/15 - 10.55%

INVOLUNTARY TURNOVER:

16/17 - 0.63%

15/16 - 0.74%

14/15 - 1.29%

Over the past two years, HR has shifted resources with the goal to establish and grow a robust outreach program. A strong and well connected outreach program, supported by business area subject matter experts, helps us attain CalSTRS' goal of being an employer of choice. We established relationships with numerous national, state and local community partners, colleges and universities and local area high schools. These relationships help support our members by teaching their students how to seek and obtain gainful employment while building a pipeline of future staff for CalSTRS.

California Department of Human Resources' Examination and Certification Online System has been implemented in phases for departmental use. In January 2016, CalHR released ECOS Phase 3A which included standardized position advertisements, and the ability to receive electronic applications. CalSTRS adopted the standardized recruitments quickly branding our advertisements to include branch and division descriptors. To date, we have successfully transitioned to electronic applications across the organization. This has improved the recruitment, experience for our candidates allowing them the ease and connectivity with CalSTRS and hiring managers by streamlining the format of candidate's submissions, increasing the amount of applicants, and shortening the timeline for release of applications to hiring managers. We anticipate enhancing our electronic communications with candidates via ECOS when CalHR releases the functionality to utilize CalSTRS-branded documents in the system. Until that time, we continue to support a dedicated recruitment email box for those electronic communications.

The CalSTRS selection process approach was revamped and released to hiring managers in fiscal year 2016-17. The selection process training, supporting tools and materials were revised to reflect a holistic approach to the selection process based on best practices encompassing guidance on pre-recruitment, recruitment and outreach, selection, background and references, and onboarding and probationary activities. New managers and HR liaisons are being educated about the benefits of these practices. Current managers are being encouraged to retake this coursework to improve their hiring skills and make the process more efficient and effective for the organization and all candidates seeking positions at

CalSTRS. HR leadership is also taking every opportunity to share successes and updates to this process during leadership meetings throughout the organization.

An integral approach of the selection process is for hiring managers to reach out to HR and partner early and often. This movement towards a collaborative hiring process is a best practice combining the knowledge of the business area with the expertise in hiring of the HR analyst. During these collaborative consultations, efforts are made to ensure recruitments are at the appropriate level and timed to maximize advertisement and outreach opportunities. To maximize interview success, a review of selection modalities and interview questions, exercises and assessments are discussed as well as consideration of hiring panel participants. So far, recruitments that have been supported by this model of consultation and collaboration between the hiring supervisor and HR analyst have resulted in better candidates and shorter hiring times, according to the hiring supervisors who have adopted the practice. An added benefit of this collaboration is exposure to the needs of each business area, i.e., program and HR. HR staff gain an in-depth understanding of the business needs, while hiring managers and HR liaisons gain valuable exposure to selection best practices, leading to improved efficiencies and outcomes for every hire. We strive to have this practice accompany recruitments organization wide to support better hiring decisions, resulting in a better return on our outreach, recruitment and selection investment.

Succession planning gaps:

Succession planning is an important subset of workforce planning that seeks to have a cadre of prepared internal staff who are ready to step up, in cases of gaps in leadership or other critical functions, to keep the organization running optimally. Due to the forward-facing nature of succession planning and the number of critical positions in our organization, a human resources management information system is particularly necessary to manage the data involved.

Mission-critical position mapping has been an initiative in need of attention for some time. Unfortunately, without an HR technology solution that can manage the process effectively, there is no way to maintain and efficiently manage all of the information.

Identifying and tracking potential successors and high performing individual contributors and teams is arduous to map and maintain. It is important that CalSTRS begin tracking potential successors and high performers to know what our talent pool consists of and where our deeper succession gaps are located.

The Knowledge Transfer and Transition Program is maturing and being piloted on a select basis. Until it is fully implemented, CalSTRS may not be able to adequately capture departing industry or organizational knowledge. It is extremely important to continue developing this program and expanding it to all senior leaders and other critical staff members to mitigate critical knowledge loss. This program is dependent upon effectively managing the mission-critical position mapping.

Risks

Retention

- People will leave if they do not feel heard or informed
- People that leave may not tout CalSTRS as a good place to work
- Closing the gaps in the professional development pipeline (e.g. specialists, pension, etc.)

Recruitment

- Hiring practices not being followed
- Quality of candidates hired

Succession Planning

- Missing information, knowledge loss
- Inability to fulfill our mission to our members if mission-critical mapping is not complete
- Lack of talent or unidentified talent in emergency situations
- Recruitment plans/succession plans not in place for executive or senior level staff could leave a gap in times of crisis
- Flight risk of internal talent pool

RECOMMENDATIONS

RECOMMENDATION	JUSTIFICATION	ACTIVITIES
Diversity and Inclusion	A diversity-and-inclusion mindset and culture is essential to developing a diverse and inclusive workforce where everyone feels heard and appreciated for the unique attributes they bring to the organization.	<ul style="list-style-type: none"> • Incorporate D&I education into onboarding. • Design and develop topic-specific learning and other developmental opportunities. • Assess D&I feedback from employee survey. • Research, introduce and pilot D&I advisory council. • Reassess and update D&I strategy map.
General Human Resources Recommendations		<ul style="list-style-type: none"> • Recommend establishment of a dedicated resource in each business area that fills roles required to support HR services at the local level—onboarding ambassador, local training coordinator, HR liaison, wellness and recognition. • Maintain and grow integrated wellness practices at CalSTRS. • Lead, guide and partner with appropriate business areas to ensure sustainable wellness practices. • Establish easy-to-use, readily available, enterprise-wide learning and development solutions that are identified during knowledge sharing events, process improvement activities and knowledge transfer sessions. • Establish an online learning resource and presence to provide CalSTRS workforce just-in-time, easily consumable/accessible information, tools and resources.
Human Resources Technology Solution	A Human Resources Management System technology platform will advance operational efficiencies and improve HR's ability to develop, manage and mature HR programs and processes that support CalSTRS objectives and workforce.	<ul style="list-style-type: none"> • Develop and publish an RFO for a project manager. • Document, prioritize and refine HR business requirements. • Develop and publish an RFP or appropriate vehicle to procure a technology solution(s). • Use a phased-in approach to implement solutions to enhance and support HR programs and processes including time and attendance, learning and development, performance management, talent management, data collection and analysis, and core HR functionality.
Outreach	Best practices indicate that outreach and timing of vacancy postings should be planned with outreach events scheduling.	<ul style="list-style-type: none"> • Proactively plan for succession and outreach of future staffing needs to enhance CalSTRS talent pool. • Business areas and HR will need to partner more closely on these efforts. • Finalize and implement the strategies outlined in the talent acquisition strategy document to support the creation and sustainability of CalSTRS talent pool. • Continue to leverage social media avenues.

RECOMMENDATION	JUSTIFICATION	ACTIVITIES
Project Workforce Realignment	Ensure the successful transition of project staff back into the workforce and support the successful implementation of Benefit Connect.	<ul style="list-style-type: none"> • Have plans in place to redirect project staff once projects are complete. • Assess skill strengths and gaps. • Develop a formal plan incorporating known change management methodologies. • Assess and recommend on organizational structure, duty statements, and alignment with future state of CalSTRS.
Talent Management	Talent management is the science of strategic human resource planning in anticipation of required human capital for an organization to meet business needs.	<ul style="list-style-type: none"> • Expand reach to area high schools, junior colleges and universities to support our teachers/members and create an entry point for promising students. • Continue to partner with business areas to establish student internships. • Continue to partner and influence statewide class consolidation efforts and civil service improvements. • Formalize talent acquisition strategy. • Continue HR's partnership with Communications to enhance CalSTRS employer brand through the pre-hire to separation process. • Partner with Communications to enhance CalSTRS.com careers site. • Support organization through standardized selection processes.

Appendix I – Accomplishments from Previous Plan

Category: Next Steps

RECOMMENDATION	NOTES	STATUS
<p>Work with the Project Review Council, led by the BusinessRenew executive officer, to identify the recommendations in this Workforce strategy document that can be immediately and/or easily implemented, as well as those that should be deferred to future years.</p>	<p>BREO position eliminated and Business Renew Branch disbanded for new shared project structure among Technology Services/Benefits and Services and Executive Branches.</p>	<p>Never attempted</p>
<p>Conduct a feasibility study with Human Resources senior leadership against all of the recommendations to determine resources and timelines needed for successful completion in alignment with the CalSTRS Strategic Plan and annual HR Branch management goals.</p>	<p>CalSTRS Strategic and Annual Business Plans were used to map out recommendations.</p>	<p>Completed/ongoing</p>
<p>Prioritize the recommendations by organizational criticality in alignment with the CalSTRS Strategic and Leadership Development and Succession Plans.</p>	<p>CalSTRS Strategic and Annual Business Plans were used to map out recommendations.</p>	<p>Completed/ongoing</p>
<p>Develop measures with the strategic planning team to determine the success of implemented workforce strategies.</p>	<p>Multiple business and performance reviews reflect workforce planning goals—operations, Admin Services, Risk Management, Business Impact Analysis and GRI.</p>	<p>Completed/ongoing</p>
<p>Annually review and re-evaluate the CalSTRS Workforce Strategy and Leadership Development and Succession Plans and the branch/division level plans to make sure current strategic initiatives are included and any changes (economic, environmental, etc.) in the workforce are identified.</p>	<p>Multiple business and performance reviews reflect workforce planning goals—operations, Admin Services, Risk Management, Business Impact Analysis and GRI.</p>	<p>Completed</p>

Category: Knowledge Transfer

RECOMMENDATION	NOTES	STATUS
Initiate a campaign to educate leaders and veteran CalSTRS employees on the importance of sharing knowledge.	Established a Knowledge Transfer and Transition Unit/piloted process with exiting DCEO (Ed Derman), program elements, SharePoint and processes in development for org-wide roll out in 2017.	Completed/ongoing
Document current procedures in HR.		Completed/ongoing
Review, update and/or create electronic desk manuals, as applicable in HR.		Ongoing
Establish functional back-ups for each position at the unit, division and branch levels.	Several business areas have established back-ups at the unit level and HR leaders have functional back-ups on ad hoc basis. Senior leaders delegate oversight to subordinate managers on a limited basis, as appropriate.	Ongoing
Institute an initiative to scrub Central for outdated policies, common procedures, etc., to streamline the accessibility and accuracy of information.	Established HR Operations Unit tasked with updating all HR policies and Central content. New HR SharePoint created and ongoing improvements being added.	Completed/ongoing
Analyze and utilize information garnered through the standardized exit interview questionnaire given to all separating employees.	This process is done on an annual basis per the contract with the third-party survey company. We receive an annual aggregated report. Have implemented an exit interview managed by Admin Branch exec and managed by select staff. Quarterly trends are reviewed and issues addressed at the leadership level, as appropriate.	Completed/ongoing
For employees not currently falling under the standard review process, such as limited-term employees, develop an assessment process for potential candidate status for future positions.	Deferred to HRMS.	Not started
Conduct critical incident interviews with key staff to ensure mission-critical events are captured, documented and a resource is available for successors or those tasked with addressing these incidents in the future.	Recommend partnering with Business Continuity and Risk Management utilizing Knowledge Transfer and Transition methodology and information retention structure.	Not started

RECOMMENDATION	NOTES	STATUS
Use the administratively established position process to hire before a position becomes vacant.		Completed/ongoing
Use the incumbent to help hire and train their successors.	Used in select circumstances, when possible and appropriate.	Completed
Invite lower-level leaders and staff members into key stakeholder groups to expand or establish relationships.	All of HR has begun cross-training and fully collaborating across units and on statewide projects (CSI). L1 and staff members are routinely asked to participate or attend higher level meetings, as appropriate, to expand skill-sets and establish long-term working relationships.	Completed
As part of findings from Executive Development pilot program.	Multiple business and performance reviews reflect workforce planning goals—operations, Admin Services, Risk Management, Business Impact Analysis and GRI.	Completed/ongoing
Facilitate workshops with senior staff—storytelling as information exchange.	This has been adopted in a cohort learning setting with subordinate leaders. EDP participants and executives are featured speakers in the Masters Series and Manager Academies.	Completed
Encourage and allow regular job shadowing opportunities at all levels of the organization.	Ongoing in HR and org-wide.	Completed
Exploit cross training through formal training and development assignments.	T&D assignments now being used to train staff outside HR for HR work and in several other business areas to expose interested employees in gaining skills and ultimately transferring into new roles.	Completed
Develop and implement a formal mentorship program. If successful as part of executive development pilot program, roll-out to lower-level leadership groups in subsequent years.	Organizational consulting team is in the process of researching best practices and developing a formal mentorship program for the entire org. Piloted in 2018.	In development
Create information and experience sharing subsites or “Communities of Practice” for various CalSTRS projects or programs on SharePoint/Central.	All business areas now actively using SharePoint for both internal project management and many other uses, including communities of practice—i.e. Leadership, Training, D&I, etc.	Completed

RECOMMENDATION	NOTES	STATUS
Continue to expand the use of SharePoint as a workflow and efficiency tool.	HR Operations spearheaded the use of SharePoint and continues to expand HR use as a functional and communication tool for internal (HR staff) and external (everyone else) customers org-wide.	Ongoing
Develop a “Leave a Legacy” program.		Not started
Video interviews conducted by newer staff of veteran staff with organization/industry knowledge.		Not started
Digitized and cataloged by topic, searchable by keyword, housed on Central or SharePoint sites, as applicable.		Not started
Develop video interviews into videos-on-demand for employees to view.	Training Services waiting for enough content to be generated. Will work with Communications and Technology Services to ensure appropriate standards are being followed.	Not started

Category: Recruitment

RECOMMENDATION	NOTES	STATUS
Complete the Pension Program Series classification study, including providing recommendations on changes to compensation levels and advanced business knowledge and technology needs in support of enterprise-wide technology projects.	Awaiting CalHR determination on using generalist classes as part of CSI consolidation or retaining this department-specific classification.	Completed
Finalize the establishment of the Pension Financial Accounting classification and begin utilizing this classification.	Established Financial Accountant classification fully implemented, in use and internal promotions related to new classification completed for FSB staff, as appropriate.	Completed
Encourage staff and leadership to utilize current professional and educational networks to assist in recruitment efforts.	Talent Acquisition is actively working with: Investments, HR, Financial Services, select areas of Benefits & Services and General Counsel. HR encourages use of this practice org-wide.	Ongoing
Complete reorganization activities related to the BusinessRenew Branch.	Completed and reorganized back into Tech Services/ B&S for better project support and shared oversight of Pension Solution project.	Completed
Pursue statutory positions for Chief Financial Officer and Chief Operating Officer.	Exec Comp/C&S	Completed
Finalize reorganization activities related to the establishment and selection of the Chief Operating Officer and Chief Financial Officer.	Exec Comp/C&S	Completed
Align and update the classification specification and compensation levels for the Deputy Chief Investment Officer.	Exec Comp/C&S	Completed
Align and update the classification specification and compensation levels for the Associate Portfolio Manager.	Exec Comp/C&S	Completed
Update the career page on CalSTRS.com to reflect and heavily market CalSTRS as an employer of choice.	Outreach	Completed/ongoing

RECOMMENDATION	NOTES	STATUS
Enhance and support Selection Services by creating a standardized path for recruiting those unfamiliar with the CalHR system: Establish a job aid to be added to CalSTRS.com career site to assist potential candidates in navigating the open exam system.	Outreach	Completed
Research and pilot electronic application submission process through CalSTRS.com.	ECOS	Completed
Institute a stringent enterprise-wide candidate screening process that adheres to the State’s civil service principles, and supports CalSTRS culture of excellence: Utilize in-house HR expertise in application screening criteria focused on quality candidate selection.	Updated selection tools and course materials, provided training and HR roadshows. Implemented additional consultation tools and administrative support in the collection of selection materials (HISS).	Completed/ongoing
Require an initial writing sample or other technical pre-screen mechanism prior to setting interview for hires, when appropriate.		Completed/ongoing
Require timed onsite interview screening exercises, prior to interview, targeted to unique business needs.		Completed/ongoing
Utilize HR analysts as partners on interview panels.		Completed/ongoing
Institute a casual “team fit” second interview process to allow trusted/key unit members to assess the candidate.	This is a common recommendation for interview panels—adding stakeholders and team members in panels for every step—not just team fit.	Ongoing
Continue to instruct internal staff on proper interviewing, application and resume preparation techniques to assist them in competing for internal positions through formal classroom training and one-on-one coaching.		Completed/ongoing
Utilize more assertive marketing language in employment opportunity bulletins and CalSTRS.com to highlight what CalSTRS has to offer versus other agencies.		Completed/ongoing
Create talent management database to map all current CalSTRS employees’ education, career path, work experience and special skills.	Attempted via Staff Directory—not readily adopted.	Deferred to HRMS

RECOMMENDATION	NOTES	STATUS
Utilize talent management database to identify internal candidates for positions and increase internal promotion rates.	No database available, using Career Counseling as one avenue to identify internal candidates.	Deferred to HRMS
Develop formal Human Resources Diversity Program to attract a further diversified workforce. Define “diversity” as it pertains to CalSTRS workforce in alignment with Investments and pending Sustainability policies, as appropriate.	See D&I efforts/reports	Implemented/ ongoing
Identify diversity gaps by using the internal talent management database to map current staff education, experience and career paths.	No database available, using Career Counseling as one avenue to identify internal candidates.	Deferred to HRMS
Develop diversity profiles for targeted recruitment based on gaps identified in talent management database.	No database available, using Career Counseling as one avenue to identify internal candidates.	Deferred to HRMS
Utilize social networking sites, not only to build CalSTRS reputation with public, but as a way to attract candidates through pre-recorded video peer/member testimonials. Encourage employees to “friend” CalSTRS on Facebook to show pride in employment, guided by CalSTRS Social Media policy, as appropriate.		Implemented/ ongoing
Use internal social networking software fields to encourage cross collaboration, employee networking and to build employee talent profiles.	Adoption is low because it’s voluntary. Recommend adding it back in as an effort in the next round as the Staff Directory is stable now.	Began implementation and campaign
Expand employee education as it pertains to career/competency development paths through a formal Career Counseling program.	Ongoing (bridging/pipelines/competency guide/job aids)	Implemented
Develop a formal internship program in collaboration with UC Davis, CSU Sacramento and private advanced degree programs to attract, train and create a candidate pool of potential hires in critical or recruitment-difficult positions (i.e. Information Technology, Investments, General Counsel, Accounting, etc.)	Piloting w/Communications. Finance has deferred until they have the structure in place to support. Tech Services pilot is in discussion for Summer 2017, as resources allow.	Implemented with Investments - Pilot in 2016, full program in 2017

Category: Training and Development

The recommendations listed below are training and development strategies and assume the use of an HR technology solution.

RECOMMENDATION	NOTES	STATUS
Provide management and staff with training progress reports biannually.	Managers and staff may use a Training Services Service Request to request their training records. Records prior to 2014 require intensive research and compilation by the organization-wide training coordinator.	Implemented but done manually
Focus on competency assessment and development, using rolling three-year baseline performance data to identify competency gaps.	The information is provided annually through APR reporting with competency gaps identified by branch/division and level (leaders/staff).	Implemented but done manually
Use employee competency assessments and documented developmental activities to build a pool of candidates capable of promoting within the State's civil service rules.	No central way to map and effectively track this information without an HRMS.	No database available, using Career Counseling as one avenue to identify internal candidates
Develop a full-fledged professional development program to ensure rank-and-file employees are being properly prepared for higher-level duties.	Please see all pipeline-related implementation from UM to Exec Dev.	Completed
Establish an Upward Mobility goal and metrics of success.		In progress - slated for completion 2017
Institute formal rotational assignments to cross train and strengthen system knowledge.	Ongoing - Exec Dev/B&S	Completed
Promote and exploit developmental work assignments at every level of the organization, ensuring that all training activities are reinforced and immediately utilized in program areas.	Initially, implemented as a Level One evaluation, which did not follow the industry standard: Kirkpatrick's "Levels of Evaluation." A learning management system will go a long way in reinvigorating this effort.	In progress
Add accountability service level agreement for payment of missed or late drop courses for all internal training to better manage training costs and resources.	No SLA but accountability being implemented via Jeff.	Completed

Category: Retention

RECOMMENDATION	NOTES	STATUS
Assess the maturing Wellness and Onboarding programs and continue to heavily market their long-term benefits to leadership and staff.	Implemented leadership Onboarding program-HR meeting, check-ins, Affinity group, etc. Increased the number of wellness events/topics and offered free classes for employees.	Completed
Continue promoting the use of CalSTRS' recognition program, Virtuosity.	Maintained excellent participation and reach numbers through creative marketing of events, occasions and Virtuoso season.	Completed
Consider telework or mobile office work opportunities.	Piloted and in use in select areas where appropriate.	Completed
Continue promoting employee development through self-advocacy and personal action rather than reliance on management as driver.	Completed as part of communication for Career Counseling and overall development. Will be made more formal with new IDP process.	Completed/ongoing
Continue to address poor performers timely to enforce a culture of excellence and adherence to standards.	Established a performance management specialist in HR to handle ongoing staff performance challenges.	Completed/ongoing
Create secondary channel for employee suggestions via a monthly contest to promote innovation and efficiencies at grass roots.	Implemented Innovation Lounge and Employee Enrichment space on the mezzanine but no ongoing programming has been established due to limited staff resources in HR.	Not fully explored
Conduct early intervention interviews.		Not explored
Use mediation techniques to encourage positive communication and early intervention for at-risk employees or poor team fit.	This is done collaboratively with Performance Management, Training Services and Employee Engagement.	Completed

Category: General for Human Resources

RECOMMENDATION	NOTES	STATUS
Immediately institute technology solutions for data capture and process efficiencies in HR.		Ongoing
Document current HR processes and develop “to be” process streamlined through technology solution.		Completed
Create Human Resources Division SharePoint site to clarify roles and responsibilities of each division and unit in HR for internal customers.		Completed
Establish standard off-boarding/separation process.	CIT has mapped; HR drafting policy, procedures and forms. All off-boarding activities will be tracked through a central process.	In development/ongoing
Continue to expand consultant model versus control model for services to other business areas.		Completed/ongoing
Develop implementation plans for chosen workforce strategies.		Completed
Map return on investment for end-to-end employee costs that includes: wages, benefits, training, development, equipment and other associated costs.	Deferred to HRMS.	Not started
Offer alternate/flexible work schedules (currently under consideration).	AWS and other flexible work arrangements being utilized org-wide.	Completed
Develop best practices metric for employee ROI.		Not started
Institute internal CalSTRS career fairs to assist in cross-functional transfer and/or resource management.	Staff resource limitation.	Not started
Develop drilled down, division-specific workforce and succession plans based on enterprise-wide and branch-wide gap analyses and branch/division level enterprise management goals.	Some ad hoc WFP efforts were completed with B&S and FSB but overall effort must be deferred to next plan cycle.	Not started

Appendix II – Related Resources

- Strategic Plan
- Business Plan
- Competency Guide
- Competency Bridging Models
- TRAIN
- Training Calendar
 - > Pre-Analyst Academy
 - > Analyst Academy
 - > Lead Person Training
 - > Emerging Leaders Series
 - > Manager Academy
 - > Masters Series
 - > Executive Development Program
- Recognition Program: Virtuosity
- Professional Development Program
- Talent Acquisition
- Outreach
- Diversity and Inclusion
- Career Counseling
- Career Ladders
- Organizational Charts
- Knowledge Transfer & Transition
- Selection Process Guide
- CalSTRS Wiki
- Upward Mobility



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