Information Technology Council

January 16, 2009

Office of the State Chief Information Officer

Agenda

- **Opening Remarks**
  - Welcome
- **IT Exam Schedule**
  - **Succession Planning Presentation**
  - **Updates**
  - Strategic Plan
  - Reorganization
  - Agency Consolidation
- **Break-out Session**
  - Brainstorming
  - **Wrap Up**
  - Questions and Answers

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Proposed Exam Schedule

- SSS II & III (Tech and Sup) – Transfer from DTS to SPB
- DPM I & II
- Staff/Senior (Tech and Sup)
- Staff /Senior (Tech and Sup)
- Assistant ISA and Associate ISA
- SSS I
- IST

(Note - need to add Telecomm classes)

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Succession Planning

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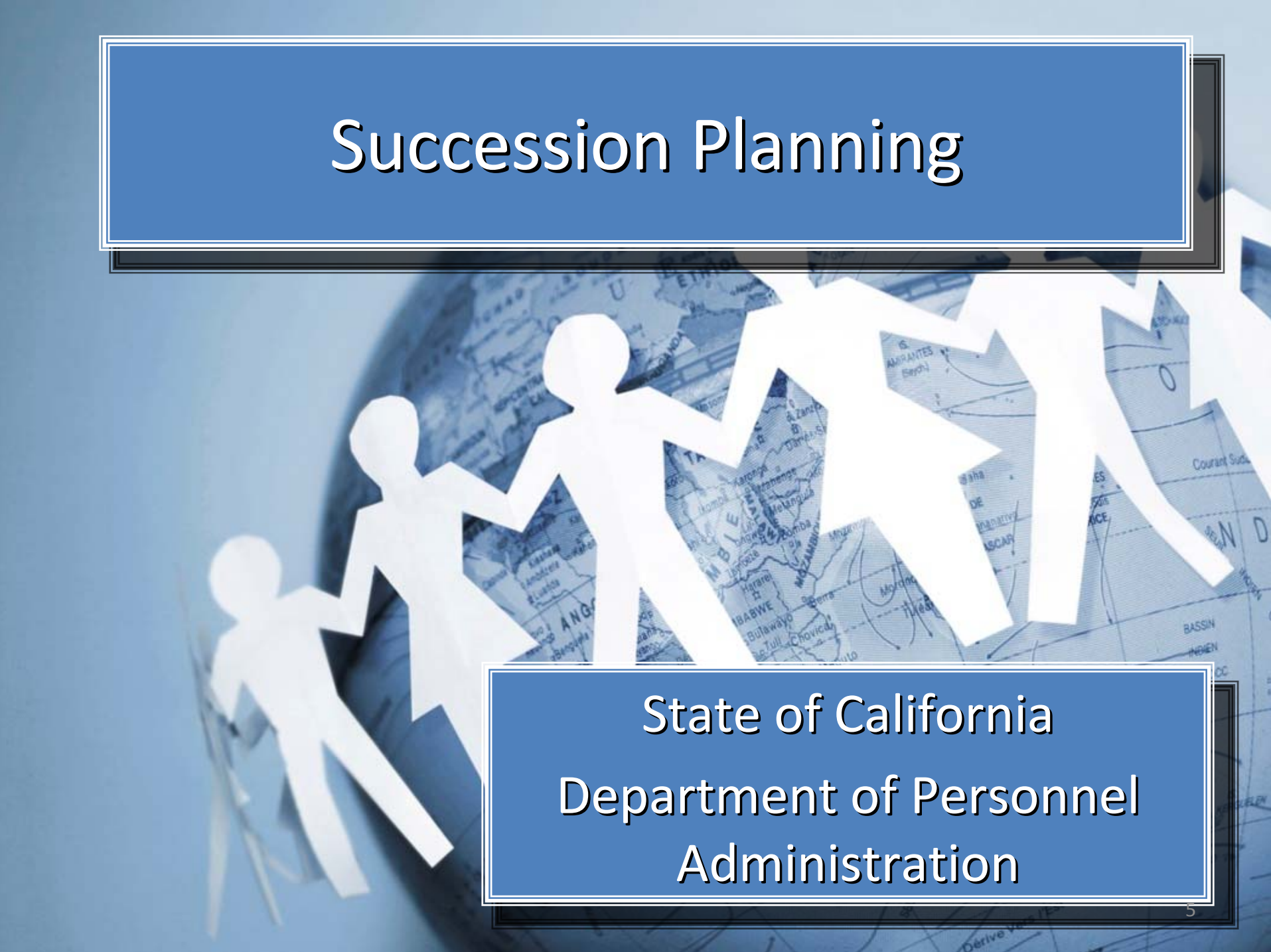
Succession Planning



State of California

Department of Personnel Administration

Agenda

- Definition and Overview of Succession and Workforce Planning
- State of California Stats
- Steps, Toolkits, Resources
- Develop Staffing Solutions
- Technology Can Simplify Succession Planning
- DPA's Statewide Workforce Planning Program

Succession VS Workforce Planning

- Workforce Planning addresses the people requirement of a strategic plan.
- It is a process where you:
  - analyze the current workforce,
  - identify future workforce needs,
  - establish the gap between the present and the future,
  - and implement solutions so the organization can accomplish its mission, goals, and objectives.

Succession VS Workforce Planning

- Succession Planning is an important subset of workforce planning. Its goal is the same, but its focus is specifically on having the right *leadership* in place at every level of the organization.

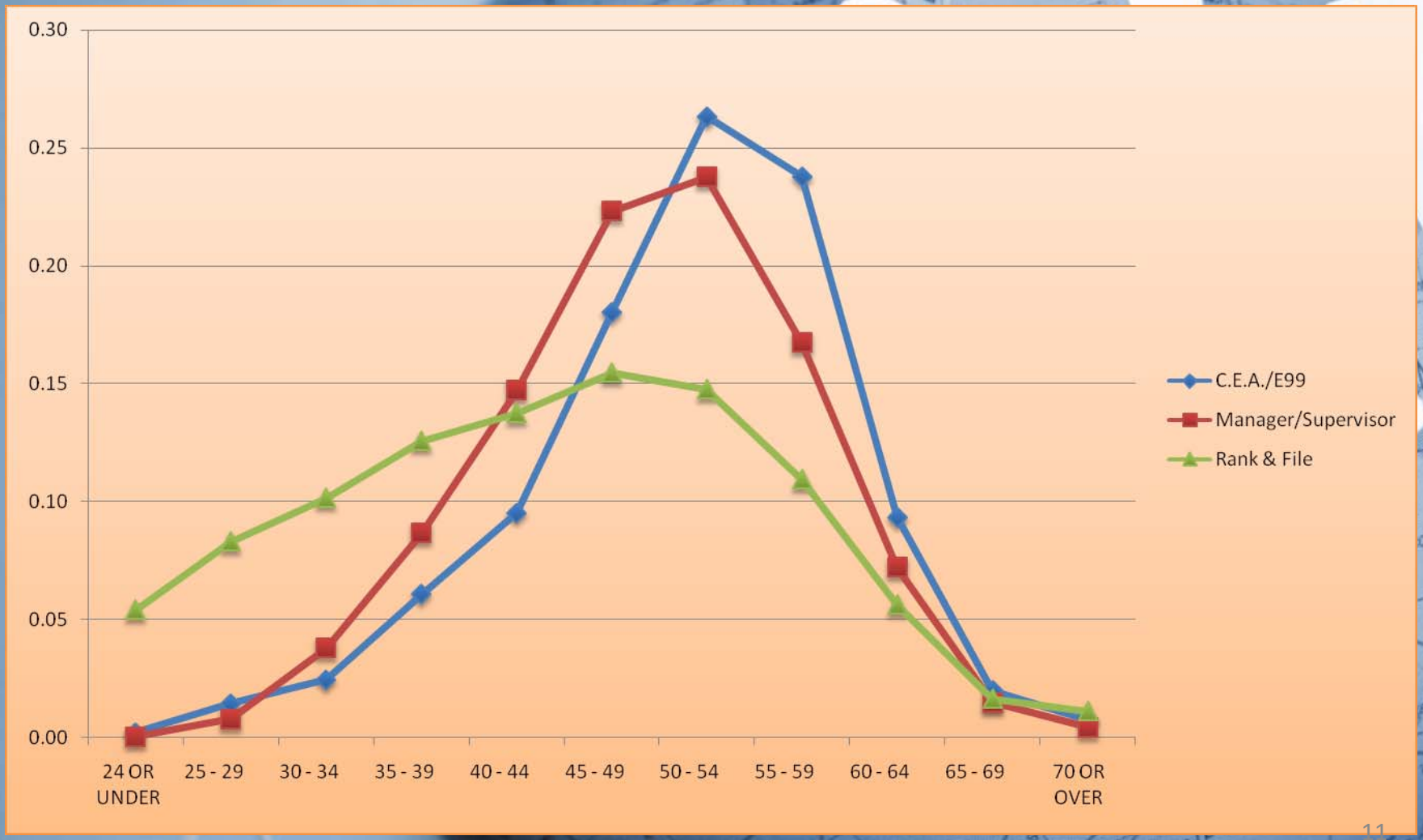
The Merit System

- The State Constitution provides for a State Personnel Board appointed by the Governor to administer the civil service system. SPB is responsible for ensuring that civil service, permanent appointments, and promotions are based on merit and competitive exams.

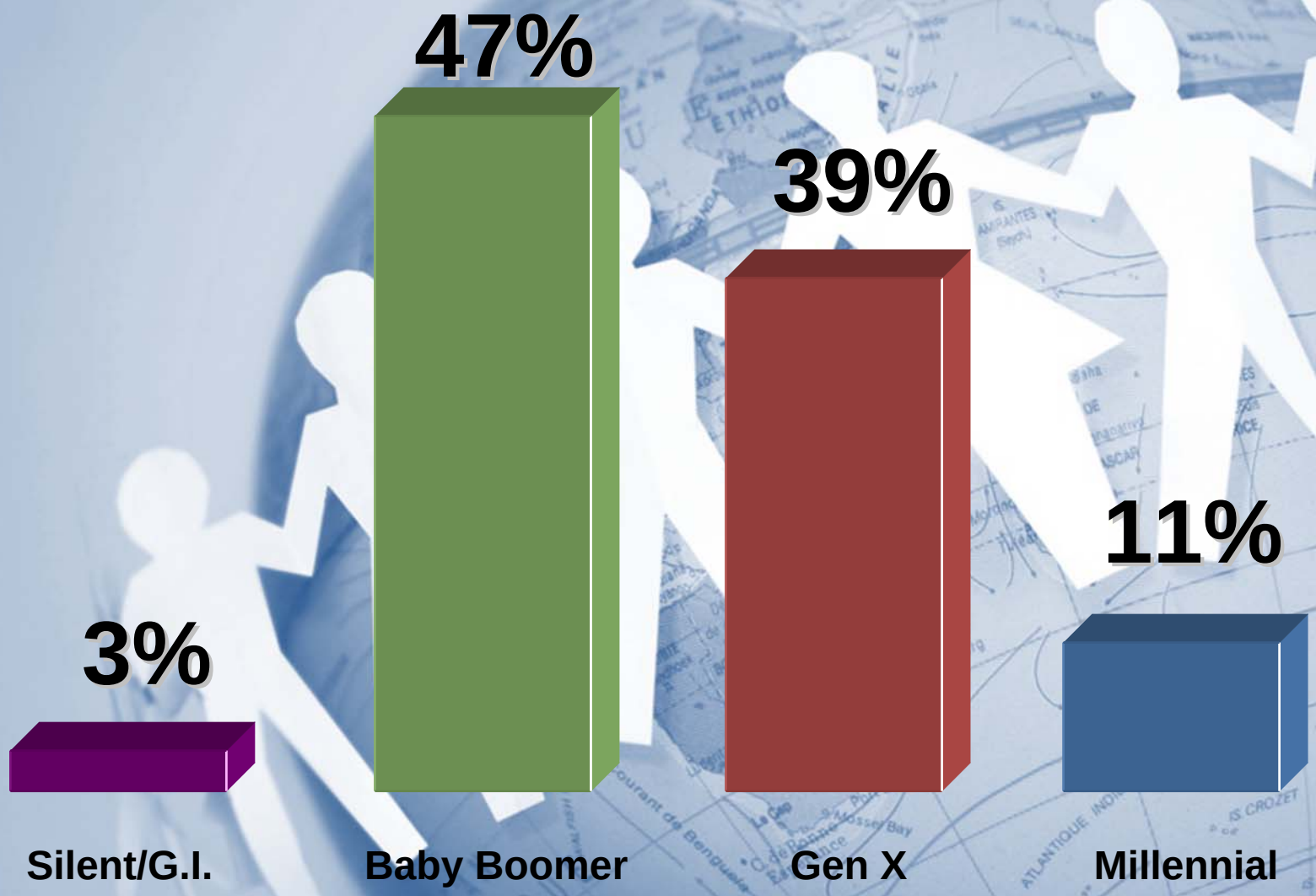
Who's Doing What?

- According to the DPA Survey this past summer, 76% of departments are in some phase of workforce planning and 78% are doing succession planning.
- Specific to IT staff, according to CIO IT Capitol Plan data, 29% of departments have a separate workforce plan for IT Staff and 22% are doing succession planning specific to IT management.

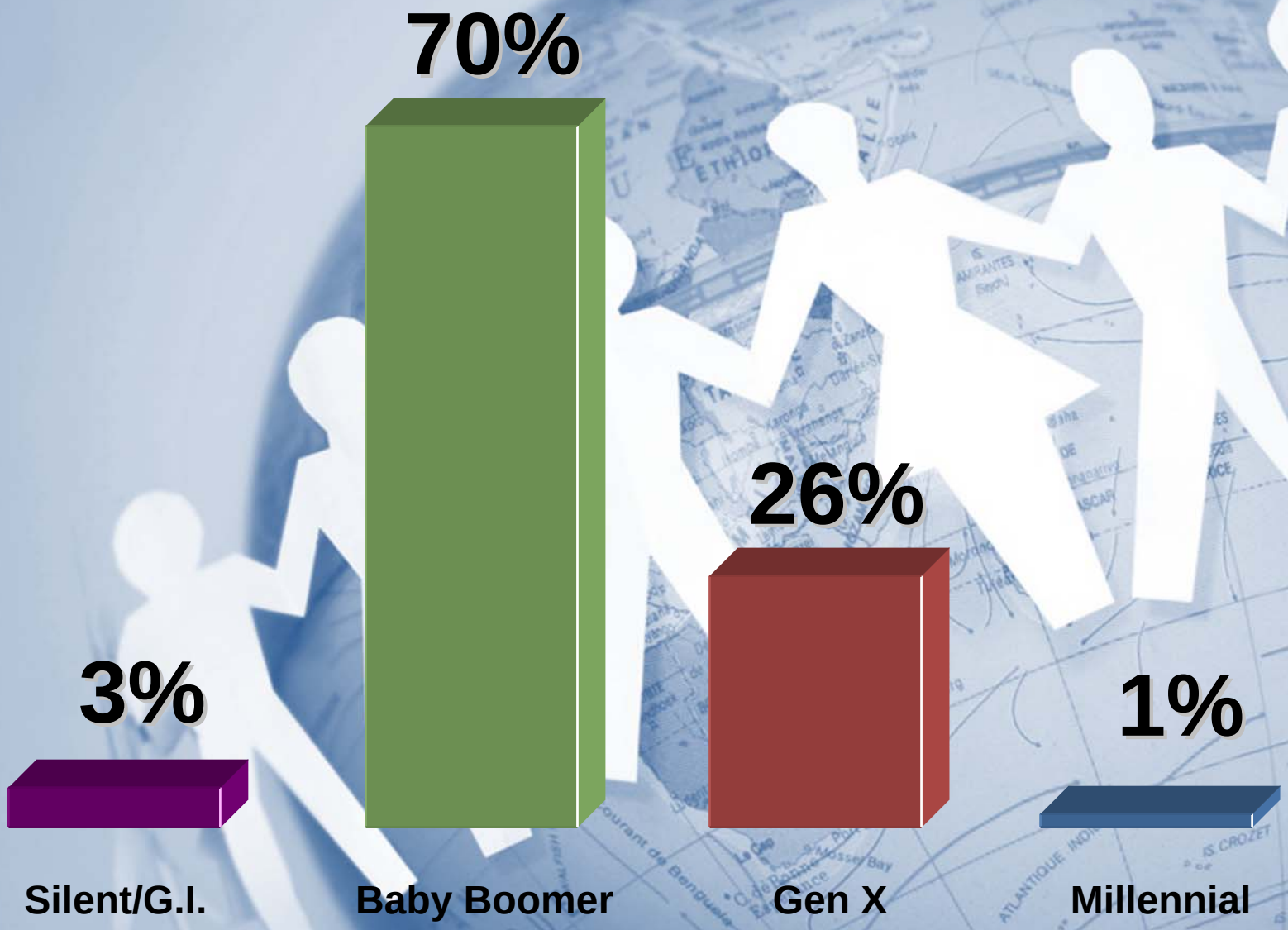
Age Demographics for State of California Employees



State of California's Workforce By Generation



Supervisors/Managers/CEAs/Exempts



Retirement Eligibility Stats

In the next 5 years:

- **62%** of CEAs/Exempts
- **50%** of Mgr/Sups
- **35%** of Rank & File

will be eligible to retire

Specific to IT Staff:

In the next 5 years:

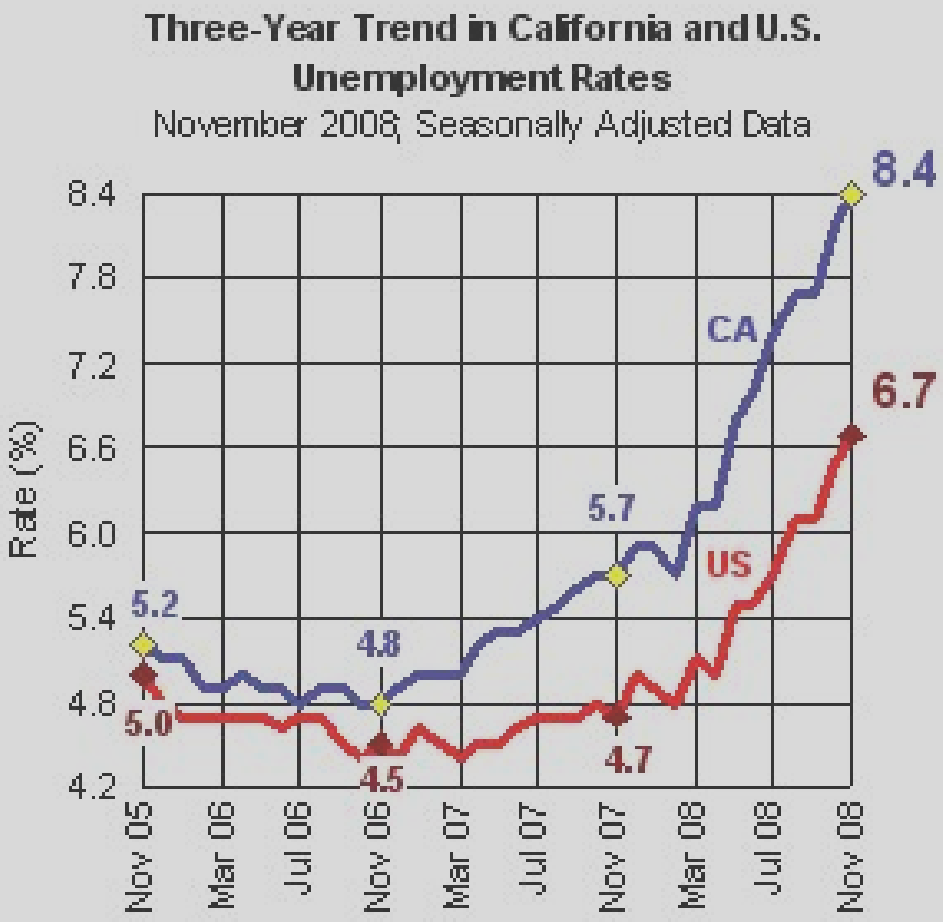
- **50.8%** of Mgr/Sups
- **30.8%** of Rank & File

will be eligible to retire

Crisis?

- In light of the current economic crisis, what is DPA saying about the "human resource crisis?"
  - Not the same crisis we were looking at a year ago
  - Number of applications up for certain classes
  - Unemployment remains high and expected to go up
  - Department budgets being affected, layoffs possible
  - Do not yet know if retirement wave will slow

Labor Statistics



How To Do Succession Planning

- Steps - Just like Workforce Planning:
  - Establish the Scope
  - Analyze current staff
  - Project future needs and competencies
  - Conduct a gap analysis
  - Create a plan with strategies and measures of success
  - Implement the plan
  - Monitor, evaluate and revise

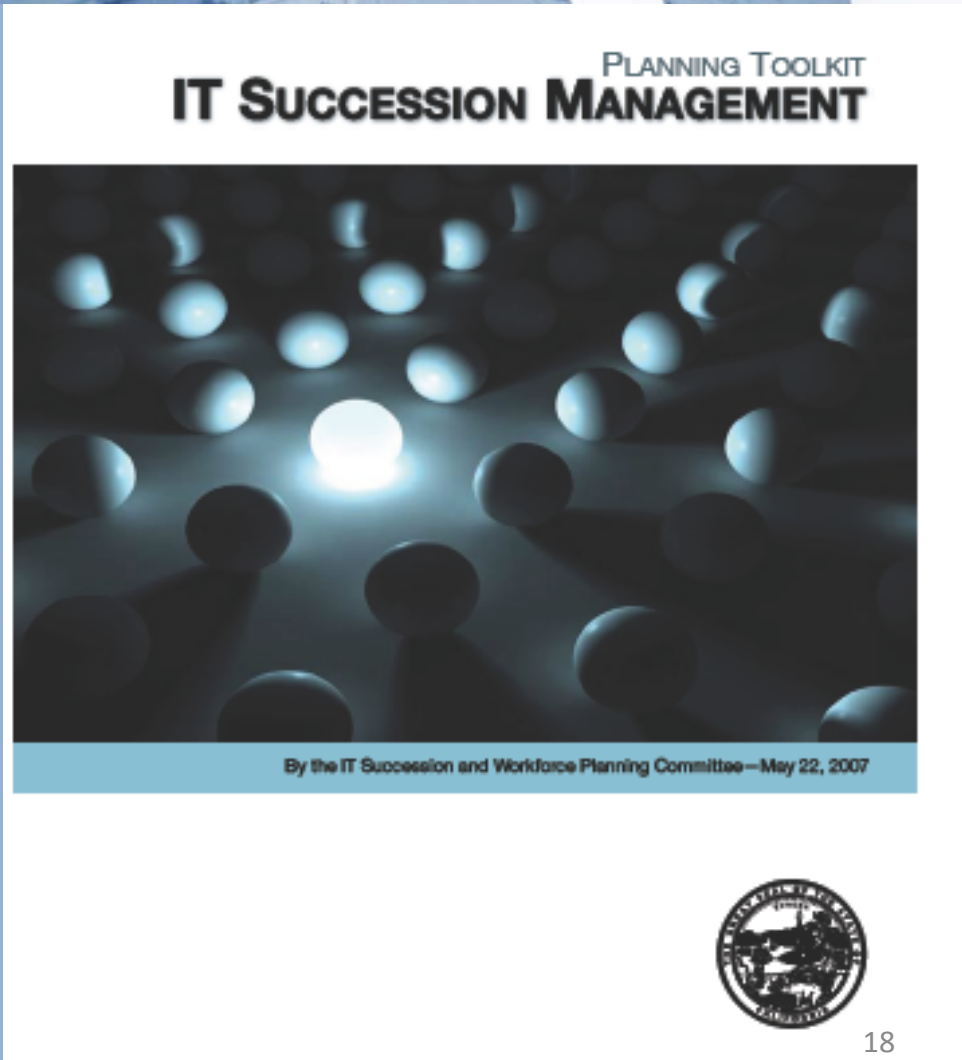
Toolkits

Available on CIO's website at: **http://www.cio.ca.gov/Government/Publications/pub.html**

State of Michigan's Succession Planning Guide

NASPE Succession Planning Guide

Both available on DPA's website at **http://www.dpa.ca.gov/personnel-**



Resources

- DPA just revised our Workforce Planning web pages, go to **http://www.dpa.ca.gov/personnel-policies/workforce-planning/index.htm**
  - Workforce & Succession Planning
  - Demographics and Labor Statistics
  - Data Collection
  - Resources
  - Training and Conferences
  - Best Practices
  - Strategies and Solutions

Develop Staffing Solutions

- Must be specific to your department's issues:
  - i.e. Retention
    - Are they retiring or transferring?
    - If transferring, are you doing exit surveys to learn why?
  - Knowledge Transfer
    - Do you have formal and informal processes to capture the knowledge of experienced workers before they leave?
    - Documentation of processes, interviews, learning games, mentoring, storytelling, best practices.

What Workforce Development Tools are Currently Being Used

- According to CIO IT Capitol Plan Info:

Training	**80%**
Upward Mobility	**62%**
Mentoring	**57%**
Career Assessments	**27%**
Knowledge transfer program	**45%**
Performance Evaluations	**69%**

Technology Can Simplify Succession Planning

- Training and Performance Management Software
  - Coordinate training
  - Career assessments
  - Track performance
- Leverage what you have
  - Use spreadsheets and data bases to track
  - Intranet set up to blog for knowledge transfer

What DPA Is Doing

- Created of Statewide Workforce Planning Program in spring of ’08.
- Help Departments in their Workforce and Succession Planning efforts.
  - Two conferences, consulting, presentations
- Collect data on Workforce and Succession Plans.
- Create a Statewide Workforce Plan.
- Implement Workforce Development solutions on a statewide level.

Bonus Slide
Top Five Non-Financial Rewards

- Schedule - have more control over their own schedule
- Relationships – who do they need to work with
- Tasks – grunt work vs. really choice tasks
- Training – learn more marketable skills
- Location – which city, where in the building, the workspace

Bonus Slide #2
Recruiting and Retaining Millennials

- Hiring is only part of the problem. Equally important is how we create challenges and learning opportunities to motivate Millennials to do their best.
  - Google – 1 million applications for 5000 jobs in 2006.
  - 22 year old Google employee, "First, they (Google) share ideals that I believe in – open source software. And their products are solving important problems for people – doing good in the world. I believe in what they're doing – these values are very important to me. I wanted to help out, to make a contribution. The second reason I came to Google is because they give me the resources I need to accomplish major things that will really make a difference in the world. The third reason is the responsibility they give you from the day you start. It makes me happy to go to work everyday."

Questions?

Thank you!

Julie Lee, Statewide Workforce Planning Manager, DPA

Updates

- Strategic Plan
- Reorganization
- Agency Consolidation

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Strategic Plan

Due to Legislature January 15th

Structured Into Three Books

- Book I – Background: Strategic Vision
- Book II – IT Capital Plans
- Book III (TBD) – Implementation Plans

Teams Developed Goals and Strategies Around Strategic Technology Concepts

Will be Reviewed by IT and Business Community – Opportunity for Input

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Reorganization Update

- Governor's Reorganization Plan
  - Documents have been prepared
  - Governor's office review complete
  - Agency Secretary review in process
- Plan is to submit to Little Hoover Commission as soon as possible this month
- LHC has 30 days to review and provide recommendations
- Legislature has 60 days to review

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Reorganization Update

- Included in the GRP
  - DTS
  - OIS
  - Telecommunications (DGS)
  - Procurement Policy
  - Reporting relationships between OCIO, AIO's, CIO's
- OIS changes to do not affect Information Security personnel in agencies

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Reorganization Update

- Procurement policy does not affect roles and responsibilities between DGS and OCIO
- Reporting relationship language is the same as was planned to be utilized in OCIO Policy Letter
- End game – Federated Model

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Agency Consolidation Plans

- Agency Secretaries were asked to develop individualized consolidation plans starting in January 2009
- Individual plans will vary by agency and focus on the following areas:
  - Networks
  - Email Systems/Productivity Tools
  - Data Centers
  - Servers
  - Shared Services

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Agency Consolidation Plans

- Target date for completion of plan is mid-year 2009
- Implementation planned to take 18-24 months depending on agency spending plans
- Plan is to reduce or eliminate upfront investment by implementing as the agency and departments plan refresh cycles

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Agency Consolidation Plans

- Consolidation Planning Committee being formed
  - Develop templates
  - Track progress

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Breakout Session

Facilitators

Christy Quinlan

Adrian Farley

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Breakout Session

Feedback on Reorganization Proposal

- Issues
- Concerns
- Questions

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Breakout Session

Suggestions on Approach for Consolidation Plans

- Questions
- Suggested Next Steps
- Concerns

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Wrap Up

- Suggested Topics for Next Meeting
- Questions and Answers

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