

Executive Summary

The objective of the 2021 UC-Coro Systemwide Leadership Collaborative program's Southern Cohort (Southern UC-Coro Cohort) project is to provide insights and a framework to help UC managers and supervisors retain and advance high-performing and high-potential staff.

For the past five years, retention of high-quality UC employees has been a growing challenge. Close to half (43%) of respondents to UC's spring 2021 Employee Engagement Survey reported that they are considering leaving UC.

To better understand this challenge and how best to address it, the Southern UC-Coro Cohort conducted primary and secondary research to shape a set of strategic goals and recommendations for UC, and to create relevant resources and tools for managers, supervisors and staff.

We conducted a review of literature covering the state of business management, human resources and trends within the human resources subcategory of employee retention and paired it with a qualitative pulse survey of the network of current and former UC-Coro participants across the system. Taken together, this research identified five key themes important to retaining talent:

- Adopt a Relational Rather than a Transactional Management Approach
- Invest in Employee Training and Development
- Provide Reasonable Scheduling Flexibility
- Offer Competitive Compensation
- Streamline Processes for Resources and Retention

These themes informed a proposed framework to enhance UC retention through three primary goals supported by seven tactical recommendations that could be implemented without overly

burdensome financial investment. In tandem with several of these recommendations, we also propose helpful tools for managers, supervisors and staff.

Goal 1: Promote Strategic Partnerships

Recommendation A: Increase engagement among supervisors, managers and human resources staff to enhance shared knowledge of career advancement policies and best practices

To foster better collaboration and consultation, we offer two examples of replicable best practices from UC Irvine and UC ANR.

Goal 2: Communicate Policies Clearly and Apply Them Consistently

Recommendation B: Clarify terminology related to career advancement

Our research reveals that terminology is a significant barrier to a shared understanding of career advancement opportunities. We encourage reviewing definitions of terms, including “promotion,” in the next policy update cycle. And to help staff, managers and supervisors better understand terms, we have created a table of Career Advancement Scenarios.

Recommendation C: Make internal recruitment and promotion procedures clear and accessible for all

As part of this recommendation, we suggest that campuses create a visual workflow for initiating and approving internal recruitment/promotion requests, and provide a sample visual we worked with UCI to create.

Recommendation D: Streamline internal recruitment and promotion procedures

Because current timelines for request, review and approval vary across the UC system and often tend to be quite long, we recommend limiting the process to less than 12 weeks at each campus and offer specific action steps to achieve that goal.

Goal 3: Empower Staff, Supervisors and Managers

Recommendation E: Actively promote systemwide tools and resources

While there are many excellent tools and resources already available, many need to be better communicated. In addition, more visual tools would be helpful. We propose a Career Advancement Decision Tree to help staff better understand and pursue their advancement options.

Recommendation F: Encourage managers and supervisors to routinely evaluate roles and provide opportunities

To assist in this effort, we have created a Talent Planning Worksheet to guide managers and supervisors when evaluating advancement opportunities for their teams. In addition, we curated a list of Manager Training Opportunities and Resources as a quick reference sheet for conducting successful talent-planning conversations and assessments.

Recommendation G: Create a series specifically on retention and talent management

We recommend that systemwide HR establish a core curriculum based on best practices and skill-building to retain and advance talent, customizable to each campus and offered on a quarterly or semiannual basis.

In summary, our seven recommendations call upon actors across the UC to take action as we work to retain our workforce.

- **Campus and Location Leadership:** Prioritize and share your commitment to the employee experience through explicit communication and, as is possible, dedication of resources.

- Systemwide Human Resources: Review and update policies to ensure terminology is defined and consistent across all locations.
- Chief Human Resource Officers: Ensure all campus divisions and departments apply policies consistently. Prominently display systemwide resources (e.g., Talent Management, UCnet's My UC Career) on campus websites.
- Managers and Supervisors: Use the resources referenced above and the tools provided here (Career Advancement Decision Tree and Talent Planning Worksheet) to enhance the career development of your teams.

We believe that the goals, recommendations and tools offered within this report will contribute to a more inclusive and equitable career advancement environment, which, in turn, will foster a greater sense of belonging and engagement, increase work satisfaction and morale, and ultimately lead to a more committed, empowered and high-performing UC workforce.