Advancing UC: Retaining Our Workforce

UC-Coro Systemwide Leadership Collaborative

2021 Southern Cohort

UNIVERSITY OF CALIFORNIA
Imagine a UC…
Direct Quotes From Our Pulse Survey

“At UC, the reclassification and raise process is completely and utterly painful”
“...the process has a detrimental impact on staff morale”
“...feels cumbersome and opaque”
“Promotion and reclass is a who you know, not what you know”
“Reclassification and equity increase seem arbitrary”
Purpose and Need

Great people are leaving UC. Our processes for retaining high performers need to evolve to meet our current challenges.
Agenda

➢ Data & Literature Review
➢ Goals & Recommendations
➢ Planning Worksheet & Decision Tree
➢ Action Items for Leadership
➢ Future Considerations
➢ Acknowledgments
Going Somewhere?

UC Retention
% of employees considering leaving

2017 2018 2019
39 41 43
34 33 33

UC Employees*  US Norm

*University of California Employee Engagement Surveys
Our department or unit has experienced challenges with staff retention within the last 3 years.

Almost 56% of respondents said that they agreed or strongly agreed.

N = 181, All UC Locations | Collected 12/2021 and 01/2022
When positions have become vacant in your department or unit over the last 3 years, how long, on average, has it taken to fill them?

More than one-third (35%) of vacancies take more than six months to fill.

N = 181, All UC locations | Collected 12/2021 and 01/2022
Themes: Literature & Pulse Survey

Career Advancement
Streamlined Processes
Relational Management Approach

Flexibility (NorCal Focus)
Competitive Compensation (Future Consideration)
“Transparency is critical for equity. Known to all and the same for all.”

- Yvette Gullatt
Vice President for Graduate and Undergraduate Affairs
Vice Provost for Equity, Diversity and Inclusion
Survey Question: I am confident I can achieve my personal career objectives

*University of California 2021 Employee Engagement Survey (n=11,256 participants)
Goals

➢ Promote Strategic Partnerships
➢ Communicate Clearly and Apply Policies Consistently
➢ Empower Staff, Supervisors and Managers
Goal: Promote Strategic Partnerships

Recommendations

1. Increase engagement between supervisors, managers and human resources
Goal: Communicate Clearly and Apply Policies Consistently

Recommendations

2. Clarify terminology
3. Make internal recruitment and promotion procedures clear and accessible for all
4. Streamline internal recruitment and promotion procedures
UCI Internal Promotion Request Process

The following is the process flow for all campus internal promotion requests:

1. **Consultation**
   - Initial consultation between Hiring Manager and Department Human Resources contact.

2. **Packet**
   - Hiring Manager prepares Internal Promotion Request packet for review with Department Human Resources contact.

3. **Review**
   - Department Human Resources contact, after reviewing with Central Human Resources Business Partner, routes the packet for review and approval.

4. **Approval**
   - Once approved, Central Human Resources Business Partner notifies the Department Human Resources contact of the decision.

5. **Promotion**
   - Department Human Resources contact notifies Hiring Manager of decision; Hiring Manager presents promotion opportunity to identified Employee.
Goal: Empower Staff, Supervisors and Managers

Recommendations

5. Actively promote systemwide tools and resources
6. Encourage supervisors and managers to routinely evaluate roles and provide opportunities
7. Create a management series specifically on retention and talent management
Assess

Succession Planning

1. On a scale from 1 to 10 (1 = least impact, 10 = greatest impact), rate the potential operational impact of the employee’s departure.

2. Who are the potential interim or permanent successors?

3. What training and how much lead time does the potential successor need for a successful transition?
Talent Planning Worksheet: Communication

Communicate

Plans and Timelines

Note: Proactive retention is an ongoing activity. What are your plans for the future?

1. When did you last have an engagement, stay or career development conversation with this employee?

2. What is the target date for your next engagement/stay/career development meeting with this employee?

3. What information do you hope to gather at this next meeting?
Talent Planning Worksheet: Measurement and Implementation

Measure/Implement

Implementation of Insights and Use of Campus-Based/Systemwide Resources

*Note: What have you implemented in response to discussions with this employee? What insights are available from various campus and systemwide survey tools and other initiatives that might be relevant to this employee?*

1. Based on the outcome of your last discussion with this employee, what items have been addressed and which need further attention during this period?

2. Have you considered how campus or systemwide resources (engagement surveys, climate surveys or other resources) may be utilized in your efforts with this employee?
## Leadership and Bias/Diversity Program

- UC Systemwide
- UC Campuses
- Non-UC resources

<table>
<thead>
<tr>
<th>UC Systemwide Management Training Series</th>
<th>Website</th>
<th>Framework/Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC People Management Series</td>
<td><a href="https://ucnet.universityofcalifornia.edu/working-at-uc/your-career/talent-management/people-management-series-and-certificate/index.html">https://ucnet.universityofcalifornia.edu/working-at-uc/your-career/talent-management/people-management-series-and-certificate/index.html</a></td>
<td>16 core courses, plus 4 electives courses which include systemwide eCourses and locally identified online and instructor-led courses.</td>
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</tbody>
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Training Opportunities and Resources

Leadership and Bias/Diversity Program

➢ UC Systemwide
➢ UC Campuses
➢ Non-UC resources

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<th>Non-UC Implicit Bias Series</th>
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<tbody>
<tr>
<td></td>
<td>eLesson: by Microsoft</td>
<td><a href="https://www.mslearning.microsoft.com/course/72169/launch">https://www.mslearning.microsoft.com/course/72169/launch</a></td>
<td>Free</td>
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<td>Incorporates quizzes throughout</td>
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<td>Transcript available</td>
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Career Advancement Decision Tree

PPSM-2: Definition of Terms

- Development at UC
  - The employee is in the beginning phases of development.
  - Explore My UC Career:
    - Yes
    - No
    - Explore Succession Planning Opportunities
  - Are there opportunities outside the unit or campus?
    - Yes
    - No
    - Explore Local and Systemwide Teaching and Professional Development Opportunities

- Growth Opportunities at UC
  - The employee is taking on additional responsibilities outside of their classification.
  - The employee is highly qualified for a permanent career opportunity.
  - Has the position proven to be extremely difficult to fill and complex or urgent in nature?
    - Yes
    - No
    - Consider an Internal Promotion or Internal Recruitment
  - Will the employee’s prior position be filled?
    - Yes
    - No
    - Discuss a Reclassification with Human Resources
  - Is this a temporary opportunity in a higher salary range?
    - Yes
    - No
    - Explore Professional Development Opportunities

- Staff Recognition at UC
  - The employee has demonstrated a high level of performance.
  - Was the high performance a result of a one-time activity or short-term project?
    - Yes
    - No
    - Consider a CPOC Award
  - Recognition and Awards:
    - Valuing high performing staff

- Competitive Pay at UC
  - A pay adjustment is needed.
  - Is the employee consistently performing above expectations?
    - Yes
    - No
    - Explore Professional Development Opportunities
  - Is there a potential pay disparity?
    - Yes
    - No
    - Discuss an Equity Review with Human Resources

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Development at UC

1. The employee is in the beginning phases of development.
2. Is there a succession plan?
   - Yes: Explore My UC Career
   - No: Explore Succession Planning Opportunities
3. Are there opportunities outside of the unit or campus?
   - Yes: Explore Local and Systemwide Training and Professional Development Opportunities
   - No: [Further action or guidance]
Growth Opportunities at UC

- The employee is taking on additional responsibilities outside of their classification.
- The employee is highly qualified for a permanent career opportunity.
- Will the employee's prior position be filled?
  - Permanent
  - Temporary
- Is this temporary opportunity in a higher salary range/grade?
- Has the position proven to be extremely difficult to fill and complex or urgent in nature?
- Has the position proven to be extremely difficult to fill and complex or urgent in nature?
- Consider an Internal Promotion or Internal Recruitment
- Discuss an Open Recruitment with Human Resources
- Discuss a Reclassification with Human Resources
- Discuss a Stipend with Human Resources
- Explore Professional Development Opportunities
- Consider an Internal Promotion or Internal Recruitment
- Discuss an Open Recruitment with Human Resources
Staff Recognition at UC

- Staff Recognition at UC
- The employee has demonstrated a high level of performance.
- Was the high performance a result of a one-time activity or short-term project?
  - Yes: Consider a SPOT Award
  - No: Consider a STAR Award nomination
Competitive Pay at UC

- A pay adjustment is needed.
  - Is the employee consistently performing above expectations? (Yes/No)
    - Yes: Learn more about the Staff Merit Process
    - No: Explore Professional Development Opportunities
  - Is there a potential pay disparity? (Yes/No)
    - Yes: Discuss an Equity Review with Human Resources
    - No: Explore Professional Development Opportunities
Summary of Recommendations

1. Increase engagement between supervisors, managers and human resources staff.

2. Clarify terminology.

3. Make internal recruitment and promotion procedures clear and accessible for all.

4. Streamline internal recruitment and promotion procedures.
Summary of Recommendations

5. Actively promote systemwide tools and resources.

6. Encourage supervisors and managers to evaluate roles and provide opportunities.

7. Create a management series specifically on retention and talent management.
What Can You Do Now?

**Leadership**
➢ Prioritize and share your commitment to employee experience
➢ Invest in modern end-to-end talent management and employee engagement platforms

**Systemwide Human Resources**
➢ Review and update policies to ensure terminology is defined and consistent
What Can You Do Now?

**Chief Human Resource Officers (CHROs)**

- Ensure all campus divisions and departments apply policies and procedures consistently
- Prominently display systemwide resources (Talent Management, My Career on UC Net) on campus website

**Managers and Supervisors**

- Use the Career Advancement Decision Tree and Talent Planning Worksheet
For Future Consideration

➢ Funding Competitive Compensation
➢ Healthy Turnover
➢ Revising Policies
Acknowledgements

Executive Project Sponsors

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Thank You!