

OTech Workforce and Succession Planning Outreach Program

Proposed Program:	OTech Workforce and Succession Planning Outreach Program
Customer:	All OTech divisions
Proposed Sponsors:	Nancy Johnson, divisional deputies to be identified
HR Coordinator:	Jennifer Hamman, Workforce/ Succession Planning Consultant
Objective:	Provide educational outreach to impacted divisions within OTech regarding how to address unique workforce and succession planning issues.
Needs Assessment and Justification Summary:	<p>The impending influx of expected retirements brought on by the aging “Baby Boomer” generation has been well documented and is of serious concern to many state agencies. OTech is no exception-- in January 2010, approximately 282 (35%) of OTech’s employees are aged 50 years or older. Of that number, 192 (68%) will be eligible to retire in the next five years, assuming they wish to retire with 20 years or more of state service. California’s economic climate and the perceived instability of state service will also likely contribute to many early retirements. These variables combined are expected to cause significant gaps within many divisions that will be difficult to accommodate with qualified staff. OTech currently has no formal program in place to provide education, outreach, and assistance regarding issues pertaining to workforce and succession planning.</p>
Proposed Concept:	<p>The OTech Workforce and Succession Planning Outreach Program, as proposed, would be a service provided to OTech management. Through workshops, its function would be to provide training to supervisors as well as to work with divisions to find viable workforce and succession planning solutions on an as-needed basis.</p>
Basic Business Plan:	<p>The Consultant would conduct an internal assessment of the organization by acquiring data regarding the age and months of State service for every employee within the department. This data would be organized by division and a risk level will be assigned to each staff to determine a probable timeframe for retirement. For example, staff who are currently at least 55 years old and have at 20 years (or more) of State service would be deemed at most risk for retirement. Staff who are between the ages of 50-54 and have at least 15 years of state service would be deemed medium risk, etc. While this is certainly not a perfect system, it would allow the Consultant to determine which divisions are generally at risk for issues related to workforce and succession planning.</p> <p>Once divisions with significant retirement risk present have been determined, three workshops would be provided by the Consultant and OTech’s Training Officer, Don Gloor, to first line supervisors. A small classroom environment would be used, and training modules would educate supervisors on the following concepts:</p>

- The basic concepts of workforce and succession planning as well as their roles in this ongoing process;
- Methods for identifying risk factors currently impacting their own units' staffing as well as anticipated staffing concerns; and
- Specific ways to address their unit's workforce planning challenges, such as the proper use of Retired Annuitants to provide critical knowledge transfer, ways to assess their current staff's potential for upward mobility, and techniques for improving their recruitment and interviewing practices to attract Gen Y candidates in particular.

Based on supervisor interest/need, more in-depth modules on these topics and other topics related to workforce and succession planning could also be developed and delivered by the Consultant and/or the Training Officer.

Post delivery, the Consultant would continue to provide assistance to management in determining methods and solutions for addressing issues related to recruitment, knowledge transfer, and current staffs' potential/readiness for upward mobility.

In order to provide the most useful training possible, the Consultant and the Training Officer request permission to conduct one-on-one interviews with first-line supervisors within impacted divisions. Supervisors would be asked to share their concerns related to workforce and succession planning as well as any knowledge transfer and management tools/techniques currently being employed. This would allow the Consultant to customize training modules and address any unique challenges which exist within OTech's divisions. The proposed interview questions are attached.

It is anticipated it would take approximately one year to assess the organization, conduct interviews with impacted supervisors, develop and customize materials, and conduct the training sessions.

Possible Obstacles:

Not all members of executive management may see workforce and succession planning as a significant problem. Their sponsorship will be critical to the success of the Program. Without executive buy-in and consistent support, first and second line supervisors will not be as inclined to work with the internal Consultant.

Coordinating workshops and follow up sessions will be a somewhat complicated endeavor. If some supervisors remain reticent to work with the Consultant on these issues or are not open-minded to new ideas, providing this training will be a challenge.

The Consultant's function is not to solve individual division's workforce and succession planning problems. The position's role is to provide consultation, advice, and administrative responsibility for internal workforce planning programs and divisional efforts. If divisions are unwilling to take ownership of their unique workforce and succession planning issues and rely solely on the Consultant to be the "problem solver," this program will not be successful.

Program Dependencies:

- Successful presentation of proposed program to OTech executive staff
- Executive sponsorship and cooperation- at least one deputy from each division is required
- First line supervisor interest and willingness to participate in interviews, attend workshops, and additional training
- Classroom facilities to provide workshops
- Curriculum design for modules and subsequent workshops related to workforce and succession planning issues

Funding Resources:

This program is extremely cost effective in that small, interactive workshops could be delivered on-site without the expense of utilizing OTech's training facilities. Curriculum development and delivery would not require an outside vendor and could easily be done in-house by the Consultant (and the Training Officer, if business needs allow.) At this time, it is not anticipated that more than one staff member would be needed to provide delivery and oversight of the Program.

Target Dates for Launch:

To be determined upon executive approval and sponsorship