

# WORKFORCE PLANNING (WFP)

WHERE WE'VE BEEN, WHERE WE ARE, WHERE WE'RE GOING

WEBCHAT WITH AVC'S JONES & POWELL – 4 OCTOBER 2016



# WFP: Where We've Been

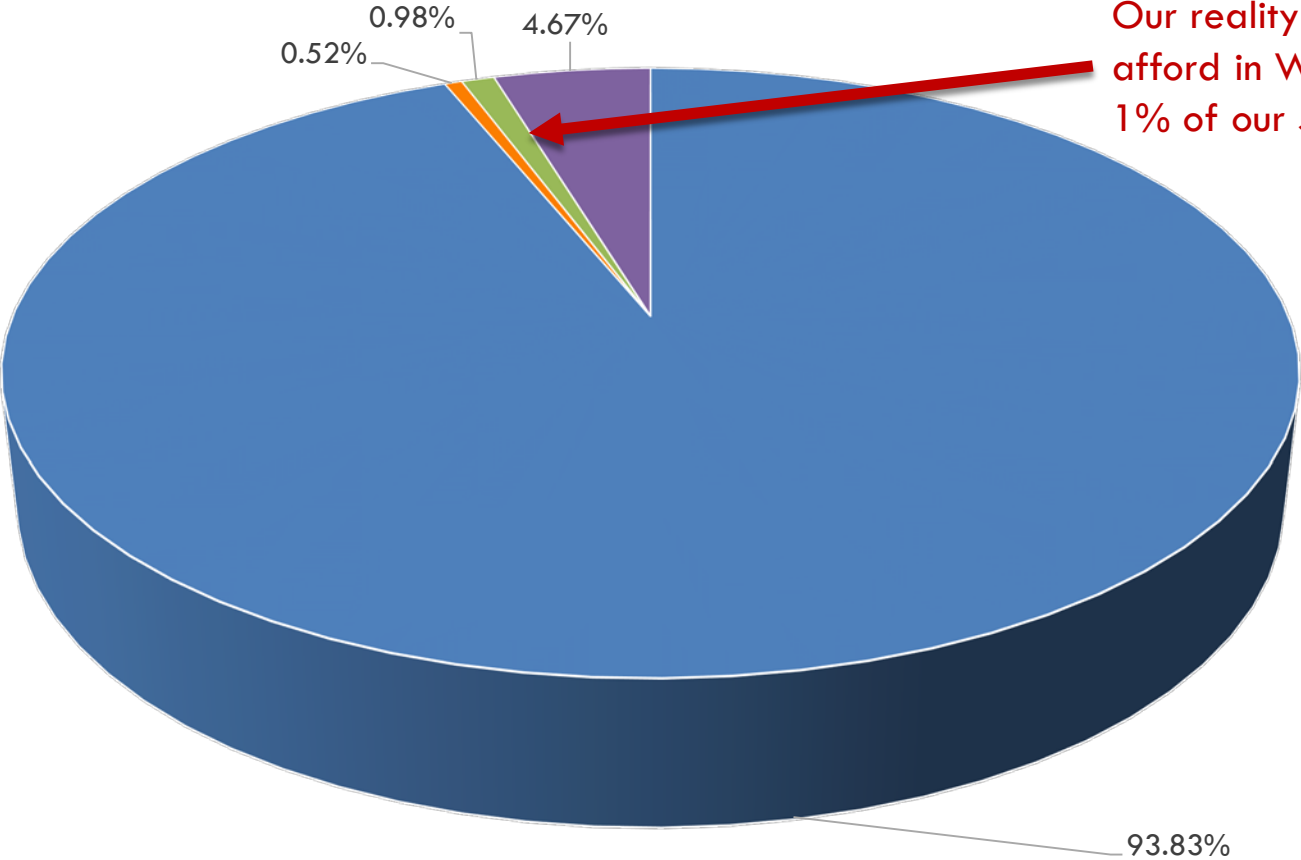
# WFP: Where We've Been (a brief recap)

- WFP Phase 1: October 2014 - April/May 2015
  - Results
- Budget Reconciliation: May – November 2015
  - Why
- WFP Phase 2: January – June 2016
  - Results
- WFP Phase 3: June – July 2016
  - Results



# WFP: Where We Are

# Budget Considerations and Realities



■ Preliminary Budget   ■ New Facility   ■ Workforce Plan & Other Incr.   ■ Cost Increases

## Step 1



# Summarize

### CURRENT STATE:

1. Snapshot assessment of current state operations & ID:
  - o Temp funded FTEs
  - o Opps to leverage FTE vacancies
  - o Under-performance
  - o Management challenges
  - o Redundancies & Cross-Divisional Functions
2. Author division and campus narratives on Current State opportunities & challenges.

## Step 2A



# Scrutinize

### FUTURE STATE:

1. Using revised WFPs, HR & Budget will offer preliminary assessment of each division's:
  - o **Must Haves** (mandates, etc.)
  - o **Should Haves**
  - o **Could Haves**
2. Provide preliminary assessment to each division for scrutiny.
3. Then, meet & confer with each division to reach Future State consensus.

\*\* ID Service Level/Quality Impact in Conference \*\*

## Step 2B



# Scrutinize

### FUTURE STATE:

- Assess reconciled priorities; HR & Budget will identify preliminary candidates for:
- o Centralization (common practices across all divisions)
  - o Quasi-consolidation (common practices among like divisions)
  - o Localization (subject matter expertise unique to division)

Prior to the development of Step 3 rec's, submit for IT and Financial calibrations

IT and Financial Feasibility Assessments

## Step 3



# Synthesize

- o HR & Budget synthesizes Step 1 & Step 2 with IT & Financial calibration & generates a series of recommendations.
- o Three components in each recommendation
  - **Drivers** (using change alignment map criteria)
  - **Components**
  - **Implementation Considerations**
- o Each recommendation restricted to 1 slide per recommendation (example attached).

WORKFORCE PLANNING: WFP Phase Three Evaluation Model



# WFP: Where We're Going

# WFP: Where We're Going

- No more WFP iterations
- Timeline
  - A WFP Roadmap will be available by Winter Break 2016
- Cabinet Deliberations: October - December
  - Mandated positions will take precedent (“off the top”)
  - Most compelling priorities will be established and agreed upon by Cabinet
  - We will begin releasing new/expansion FTE slots starting with the October 12<sup>th</sup> Cabinet Meeting



# WFP: Where We're Going

## ■ High-Level, Key Considerations

### ■ The Change Alignment Map Focuses Cabinet Prioritizations

#### ■ As a community, we determined our guidelines for project priorities:

- Does it impact Research Excellence? Academic Distinction? Student Success? Services & Support? Professional Development? Organizational Sustainability? Diversity & Inclusion?

### ■ Balancing the Academic Mission with Budget Constraints

#### ■ As we prioritize, we will focus on the Academic Mission...

- That does not exclude Administrative Operations from consideration.
- Indeed, the work of our Administrative Operations supports and enhances our Academic Mission. The two are not mutually exclusive; **they move in tandem.**

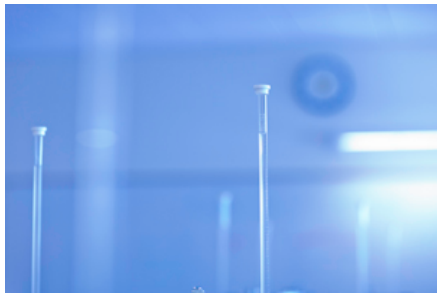
#### ■ ...To achieve self-sufficiency, budget considerations must also be at the forefront as we prioritize.

# WFP: Where We're Going

- High-Level, Key Considerations (continued)
  - Shared Services as part of the WFP evaluation model
    - Built in because it is our new budget and operating reality.
    - Our challenge is also our opportunity: build a shared services model that is more responsive and less bureaucratic when compared to failed experiments at UCB & elsewhere.
  - We are off to a good start with ACT.
    - Of course with this new type of service delivery model there are going to be enhancements that need to be made. This is calibration.
    - As we calibrate, we must work collaboratively to prioritize those calibration enhancements for the benefit of the campus as a whole.

# WFP: Where We're Going

- High-Level, Key Considerations (continued)
  - Rethinking existing organizational models
  - Tolerable Suboptimization
    - As the previous pie chart demonstrated, we have resource constraints.
    - Our FTE expansions must be strategic and aligned to *most compelling needs*.
    - No one will be getting everything requested in WFP submissions.
    - That brings us to the concept of Tolerable Suboptimization
      - “Absent an allocation of X resources, then we must accept Y level of suboptimization.”
      - Examples



## END: WORKFORCE PLANNING (WFP)

WHERE WE'VE BEEN, WHERE WE ARE, WHERE WE'RE GOING

WEBCHAT WITH AVC'S JONES & POWELL – 04 OCTOBER 2016