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

Our reality: what we can afford in WFP is less than 1% of our 5-yr budget
**IT and Financial Feasibility Assessments**

**Summarize**

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

**Scrutinize**

**FUTURE STATE:**
1. Using revised WFPs, HR & Budget will offer preliminary assessment of each division's:
   - Must Haves (mandates, etc.)
   - Should Haves
   - 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 2A**

**Synthesize**

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

**Step 2B**

**Scrutinize**

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

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

**Step 3**

**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 12th 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:

- 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.
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