
California Student Aid Commission

Workforce Plan

for

Fiscal Years 2018 - 2021

A Message from the Executive Director

At the California Student Aid Commission (CSAC), our employees are considered our most valuable resource. We are invested in the development of our employees to build a capable and diverse workforce. The Workforce Plan provides a groundwork for identifying the skills and competencies needed to select, support and retain the CSAC workforce.

This plan identifies challenges our agency faces, and includes such initiatives as knowledge transfer that would be lost due to retirement and other types of separations, and recruitment and retention of qualified staff to achieve the vision and mission of CSAC.

The five-year strategy detailed in the following pages will address the issues and challenges identified during plan development. I encourage everyone to read and become familiar with the strategies. You are vital to the success of implementation and in shaping the future of the CSAC workforce.

Lupita Cortez Alcalá
Executive Director

Table of Contents

A Message from the Executive Director.....	i
Table of Contents.....	ii
Forward.....	1
Strategic Direction.....	1
The Commission’s Mission and Vision are:.....	1
Methodology.....	2
Workforce Overview.....	2
Current Workforce Profile.....	2
Key Leadership.....	3
Demographics.....	3
Ethnicity and Gender.....	3
Age Demographics.....	4
Workforce Gap Analysis.....	4
Separation Trends and Forecast.....	5
Retirement Eligibility.....	5
Competencies.....	6
Retention Gaps and Risks.....	6
Professional Development Gaps and Risks.....	6
Knowledge Transfer Gaps and Risks.....	7
Succession Planning Gaps and Risks.....	7
Workforce Planning Initiatives.....	7
Improve Staff Morale.....	7
Employee Recognition.....	8
Create an Exit Survey.....	8
Change the Culture of Employee Interaction.....	8
Teambuilding Exercises Between Divisions.....	8
Create a Value Statement.....	8
Create and Implement an On-Boarding Program.....	9
Training and Development.....	9
Develop a Competency Based Development Guide.....	9
Implement a Cross-Training Plan.....	9
Create an Annual Training Plan.....	9
Business Process Improvements.....	10

Review Duty Statements	10
Develop and Update Policies and Procedures	10
Succession Planning Initiatives.....	10
Conclusion	10
Appendices.....	11
Appendix A: Strategic Map.....	1
Appendix B: Leadership Organization Chart	2
Appendix C: Action Plan	3
Appendix D: Communication Plan.....	6
Contact Information	7

Introduction

Forward

Workforce planning is an ongoing process that seeks to align the needs and priorities of the organization to the number of staff and respective knowledge, skills, and abilities required of its workforce. Workforce planning is an active process which informs the organization and stakeholders of current and future environmental impacts and incorporates initiatives and strategies necessary to ensure human capital and talent management efforts support the business goals.

Workforce planning is a challenging process as it forces us to think about how to strategically align the workforce to the organizational business needs. Workforce planning can include any workforce challenge an organization faces—from recruitment, selection, compensation and training—to knowledge transfer, succession planning, retention and more.

Within this report, we will discuss the challenges and opportunities faced by the California Student Aid Commission (Commission) and provide a comprehensive analysis of our existing workforce. We will also identify several strategic initiatives that will be undertaken in the next five years to ensure the Commission can meet its mission, vision, goals, and objectives.

Strategic Direction

The Commission's Mission and Vision are:

Making education beyond high school financially accessible to all Californians.

Toward a California that invests in educational opportunity, fosters an active, effective citizenry, and provides a higher quality of social and economic life for its citizens.

This workforce plan supports the following strategic plan goals:

- Invest in trainings, staff recognition and collaboration tools

- Continue to recruit and retain high quality staff

The strategic direction components can be identified in Appendix A: *Strategic Map*.

All initiatives in the workforce plan support developing the Commission's staff through significant culture changes, implementing an employee recognition plan, creating ways to

increase retention, and ensuring we retain those staff through succession planning and other professional development efforts.

Methodology

The Commission's workforce planning approach began with compiling information from the past two years on Commission staff to identify gender, ethnicity, separation reasons, age, total state service and classification. A facilitated SWOT analysis was conducted with executive staff to identify workforce challenges within the Commission.

As the workforce plan is implemented within the Commission, the communication plan outlined in Appendix D: Communication Plan will help facilitate workforce efforts in the coming years, and ensure all responsible parties are identified and appropriately trained for full implementation of the plan.

Workforce Overview

Current Workforce Profile

The Commission is a small department with less than 125 permanent staff. The organization is composed of four primary divisions: Fiscal and Administrative Services Division, Information Technology Services Division, Program Administration and Services Division and the Executive Division. Within those divisions there are 17 business areas:

- Accounting
- Budgets
- Business Services
- Human Resources
- IT Governance Services Section
- IT Support Services Section
- Information Security Office
- Application Services
- Enterprise Services/Configuration Management
- Institutional Support
- Systems Analysis and Operations
- Program Compliance Services
- Customer Assistance and Processing
- Specialized and Outreach Programs
- Research, Evaluation, and Data
- Government Affairs and Communication
- Legal Services

Key Leadership

The Commission's key leadership consists of:

- Executive Director
- Career Executive Assignments (3)
- Staff Services Manager III (2)
- Staff Services Manager II (4)
- Information Technology Manager I (2)
- Information Technology Supervisor II (3)

The Commission's organization chart can be found in Appendix B: Leadership Organization Chart.

Demographics

Ethnicity and Gender

The Commission's workforce is comprised of 62 percent women and 42.5 percent men. The Commission's overall ethnic composition is 35 percent Caucasian, 31 percent Hispanic, 22 percent Asian, and 10 percent African American. Pacific Islander, Native American, and "Other" make up 6.5 percent of the workforce. Listed below is a comparison of the Commissions' ethnicity and gender statistics compared to civil service statewide data.

Table 1. The Commission's and Statewide Gender and Ethnicity Demographics.

Demographic	Student Aid Commission	Statewide
Women	62	45.9
Men	42.5	54.1
Caucasian	35	45.1
Hispanic	31	23.9
Asian	22	16.9
African American	10	10.3
Other	6.5	3.8

*Excludes Retired Annuitants and Student Assistants

Age Demographics

The average age of a Commission employee is 45 years old, while their average tenure in state service is 11 years. Currently, approximately 31 percent of the workforce are at retirement age (or are eligible to retire at age 50), and another 5 percent are within five years of the average retirement age. These averages are slightly lower than the statewide averages of 41 percent at retirement age and 27 percent within five years of the average retirement age but still pose a risk to our statewide programs.

Only 22 percent of the Commission’s workforce is composed of Millennials, including many with a few years of state service. The Commission has a much larger Generation X workforce at 51 percent which reinforces the need for significant knowledge transfer and professional development initiatives. In the next table, a generational breakout is provided by grouping within The Commission. This information informs us of where we have a higher risk of knowledge loss due to impending retirements.

Table 2. Generational Breakout by Grouping

Student Aid Commission Generational Data				
Groupings	Millennials (1982 - 2004)	Generation X (1965 - 1981)	Baby Boomers (1946 - 1964)	Traditionalists (1925 - 1945)
Rank-and-File	22	42	18	1
Managers and Supervisors	1	8	7	0
Staff Services Manager III	0	1	0	0
C.E.A.	0	1	2	0
Exempt	0	1	0	0
All Permanent Civil Service	23	53	27	1

Workforce Gap Analysis

A gap analysis was performed to determine the gap between our workforce supply and demand. Results are intended to reveal gaps and surpluses in staffing levels and competencies needed to perform the department’s functions. The Commission conducted meetings with division/program area chiefs to help identify mission critical workforce gaps in competencies and staffing. This process took into consideration labor market trends, such as diversity expectations and challenges, as well as difficult to recruit classifications. Understanding the external factors which have a big impact on the mission and services of the Commission (e.g. legislative changes, collective bargaining activity, and governor term shifts) was also a critical component of exploring current and future workforce gaps. Executive staff feedback, in combination with the Commission’s comprehensive workforce data analysis, revealed

department-wide gaps in the areas of recruitment, retention, knowledge transfer, and succession planning.

Separation Trends and Forecast

Separation rates for years 2015, 2016, and 2017 were analyzed. Results show a total of 28 separations (27 percent of total employees) in 2015, 26 separations (25 percent of total employees) in 2016, and 23 separations (22 percent of total employees) in 2017. During the same three-year period, 13 employees that were at the average age of retirement (59 yrs.) retired. For the other categories of separations, which included termination without fault, voluntary separations, and transfer to other departments, they have trended downwards although the average count of employees increased slightly. Based on recent trends, we estimate approximately 23 separations (22 percent) will occur in 2018.

Industry benchmarks for cost per hire is \$4,129.00. Averaging the years 2015, 2016, and 2017 results in 26 separations annually, with a potential cost to the Commission of between \$85,563.00 and \$111,483.00. The Commission does not currently have an exit process in place and has been unable to identify the reasons staff leave. Employee recognition is one of the most important factors which go a long way in retaining staff, other factors include proper leadership, employee engagement, feelings of accomplishment on the job, being valued, and professional development. The Commission will develop and implement an employee retention plan to reduce separations and increase retention.

Table 3. The Commission’s Separation and Forecast Trends

Separation Snapshot for Permanent, Civil Service Employees										
Years	Voluntary Separation	Voluntary Separation Rate	Retirement	Retirement Rate	Involuntary Separation	Involuntary Separation Rate	Health, Disability, Family	Health, Disability, Family Rate	Total Separations	Annual Avg. EES Count
2015	20	19.32%	6	5.80%	2	1.93%	0	0.00%	28	104
2016	18	17.65%	7	6.86%	1	.98%	0	0.00%	26	102
2017	22	20.95%	0	0.00%	0	0.00%	1	.95%	23	105
2018	22	20.94%	2	1.90%	0	0.00%	0	0.00%	21	105
2019	21	19.93%	2	1.00%	0	0.00%	1	.48%	17	108

Retirement Eligibility

Approximately 30 percent (32 employees) of the Commission’s workforce is 50 and older. This includes 6 employees in key leadership positions, 4 employees in management/supervisory positions and 22 rank and file employees. The average retirement age for the Commission is 59 years old.

Without the use of desk manuals most knowledge transfer is via formal training. This method is best used to transfer explicit information, and while this can clearly provide a strong foundation for knowledge transfer, it only addresses a portion of the knowledge equation.

The Commission must develop and implement a plan to recruit for the upcoming vacancies while planning for the transfer of tacit knowledge within its ranks before staff retires. Failure to do so may result in retirements and staff turnover that negatively impacts key positions through the loss of valuable knowledge and critical work functions.

Competencies

Competencies are the knowledge, skills and behaviors needed for individuals to succeed on the job. Competencies help employees to:

- Understand what is expected in their job
- Know what key behaviors to demonstrate
- Discuss strengths and development areas with their supervisor/manager
- Align training and development opportunities for current and future growth.

The Commission will be using the CalHR statewide competencies to create and implement a plan that will align competencies, classification/job duties, and training. This plan will articulate the necessary capabilities required to optimize individual and organizational performance.

Retention Gaps and Risks

Retention gaps resulting from current workforce challenges and trends include:

- Cross-training has not been a focus for the Commission and as a result, knowledge has been lost when turnover occurs. Due to the specialized nature of tasks and assignments minimal staff, and statutory deadlines, it is difficult to cross train without interrupting the work flow.
- Retention has also been a challenge for some divisions that otherwise lacked promotional opportunities for employees. Some divisions describe a lack of a career path due to the use of a combination of general job classifications and department specific classifications that do not allow for movement between them. This is true of most small agencies.
- Competition from the private sector continues to impede hiring quality staff in the Information Technology Services Division.

The risk of not addressing these challenges is that the Commission may not be able to retain qualified candidates, provide quality services to the state, or meet its mission and vision.

Professional Development Gaps and Risks

Professional development gaps resulting from the current workforce challenges and trends include:

- Aligning training to necessary competency development.
- A lack of documented key competency identification. Without identifying key competencies, it is challenging to create an effective professional development plan for employees.

- Professional development and training opportunities have not been widely available to the Commission in recent years due to budgetary restrictions, which has created voids in many employees' training history.

The risk of not addressing these challenges is the Commission may not be able to retain the knowledge and expertise needed to provide quality services to the state, or meet its mission and vision.

Knowledge Transfer Gaps and Risks

Knowledge gaps resulting from current workforce challenges and trends include:

- Business policies and procedures are not documented in many divisions which have created knowledge transfer gaps as personnel separate.
- There is a lack of knowledge transfer within divisions, but there is also a lack of knowledge transfer between divisions. Cross collaboration fosters knowledge transfer.
- New hires are on-boarded inconsistently, due to the lack of a formal on-boarding or training program.

The risk of not addressing these challenges is that the Commission may not be able to retain the knowledge and expertise needed to provide quality services to the state, or meet its mission and vision.

Succession Planning Gaps and Risks

Succession planning gaps resulting from current workforce challenges and trends include:

- A lack of documented succession planning programs, which include leadership competency identification.
- A lack of documented mentoring programs or professional development guidelines for management and employees to properly prepare for succession.

Workforce Planning Initiatives

Workforce planning consists of a four-step process: (1) analyzing the current workforce, (2) identifying future workforce needs, (3) establishing the gap between the present and future, and (4) implementing solutions to address the gaps between the present and future workforce needs.

The workforce planning initiatives that will be implemented or improved on to meet current and future workforce needs are listed below.

Improve Staff Morale

Employee Recognition

Employee recognition is a communication tool that reinforces and rewards the most important outcomes that people create for your business.

When employees are recognized effectively, the actions and behaviors that employers most want to see repeated are being reinforced, with a chosen means of recognition. This recognition reinforces the employee's understanding of how the employer would like to see him or her contributing in the workplace.

Most employees want to be effective contributors, because it reinforces their own positive self-image, their self-worth, and self-esteem, employer positive recognition is meaningful and supportive. An effective employee recognition system is simple, immediate, and powerfully reinforcing.

Create an Exit Survey

Develop an Employee Exit Survey that will provide valuable feedback from separating employees that will allow Commission management to improve internal conditions and reduce turnover.

Change the Culture of Employee Interaction

Teambuilding Exercises Between Divisions

Teambuilding brings people together by encouraging collaboration and teamwork. One of the most powerful reasons for team building is to get results. Through a series of planned team bonding events that are fun and motivational, teams build skills like communication, planning, problem-solving and conflict resolution.

Teambuilding can create a friendly work environment, where people are comfortable and happy to talk to and work with anyone.

Create a Value Statement

A declaration that informs the customers and staff of a business about the top priorities and what its core beliefs are. Companies often use a value statement to help them identify with and connect to targeted consumers, as well as to remind employees about its priorities and goals. A value statement captures the core values of a company, which are the deepest and most strongly felt principles a company holds. So important are these beliefs, that a company will not compromise them. They are constant, and, therefore, a well-written value statement should be considered a long-term or even permanent declaration.

Sometimes companies include core beliefs in their mission statements. A mission statement explains why a company exists. Companies might also include values in vision statements -- aspirational declarations of what a business aims to become. Mission and vision statements change as a business evolves, while a company's core values remain steadfast. A stand-alone

value statement provides a standard against which new mission and vision statements can be measured. Because all strategies and objectives arise from mission and vision, aligning them with the value statement ensures value-driven organizational action.

By setting forth what a company stands for -- its character -- the value statement defines organizational culture. When everyone must adhere to core values, the common commitment promotes unity of purpose and builds company identity. The statement enables this process by telling employees what is right and wrong, helping them determine actions and standards that will gain approval and promote success. To ensure values are more than just words, a company can make the statement part of its organizational life through rituals and practices that revolve around values. These might include awards, competitions and gatherings.

Create and Implement an On-Boarding Program

Create a relevant and sustainable new hire orientation that will contribute to the retention of new and existing employees by:

1. Making the new employee feel welcome at the Commission
2. Help new employees understand the culture of the Commission
3. Provide a knowledge base that will help them feel like a contributing employee
4. Present a high-level understanding of the various departments and roles within the Commission

Training and Development

Develop a Competency Based Development Guide

This guide will assist all employees with training needs and address:

1. Core and leadership competency definitions and levels and classifications affected
2. Competencies by classification
3. Suggested training for identified class series
4. Suggested training by skill
5. Suggested training by specific job

This guide should help employees to self-identify their interest in participating in succession planning within the Commission or career development/change.

Implement a Cross-Training Plan

Instituting formal rotational assignments to cross train and strengthen system knowledge.

Create an Annual Training Plan

Encourage managers/supervisors to work with their staff and create an annual IDP plan. This information will be used to create the training plan. Once completed, managers will receive a report that indicates who and what type of training has been completed on a quarterly basis. This will allow for any adjustments that may be needed.

Business Process Improvements

Review Duty Statements

Duty statements are the most important element of a position description. They tell what work is performed in the position. They are the primary source of information used to assign the position to a classification. They also define the work so that job expectations and training needs may be identified. Ensuring there is a current duty statement for each position within the Commission will not only capture any changes that occur within a job but will also identify the correct classification is being used.

A well written job description is imperative for:

1. The Commission
2. Training needs
3. Recruitment
4. Evaluation
5. Validates the employee and their purpose in their Division

Review duty statements for each position:

1. Identify the job's major components
2. Describe the work done within each component; include the end product
3. Identify the level of work
4. Indicate why the work is done
5. If important, note any aids, equipment, or tools necessary to perform the task

Develop and Update Policies and Procedures

Review all current policies and procedures; update as needed for any organizational changes as well as laws, statutes, government codes, etc.

Review the Commission's organizational structure to determine any key risk areas that may need to be addressed

Succession Planning Initiatives

Attend the CalHR Succession Planning cohort to plan for future leaders within the Commission.

Conclusion

The Fiscal and Administrative Services Division will assume responsibilities for the Workforce Plan, the Human Resources unit will implement and monitor the plan.

While this plan attempts to address organizational continuity within the Commission, it is only a starting point. It is essential to our success in meeting our mission as a Commission to have this workforce and succession plan in place to meet the challenges we face in a systematic manner.

This Workforce Plan is a focused effort to retain a valued workforce, to decrease the turnover rate and to encourage individual development of each staff member.

Implementing strategies such as on-boarding, team building, employee recognition, and training plans will enrich opportunities for employees to reach their individual potential in a supportive environment.

Appendices Table of Contents

Appendix A – Strategic Map	1
Appendix B – Leadership Organization Chart	2
Appendix C – Action Plan	3
Appendix D – Communication Plan	6

FINANCIAL AID ADMINISTRATION AND DELIVERY

GRANT DELIVERY SYS	Vision for a next generation system	★	Plan in process
DATA SECURITY	Vendor Identified will be in place June/July 2017		
COMPETITIVE AWARDS	Paid rates report tracking	★	Improve Cal Grant Communications
	Identification of optimal recycling times	★	Increased paid rate to 97.2%
WEBSITE	Vendor identification to plan, host & manage new website in process		
STAFF	Increased communication & training	★	Recognition & celebration



Develop multi-phased approach & request implementation \$
Implement improvements to database security
Identify vendor for improved student outreach
Require high schools to work with CDE
Propose legislation; competitive award offer flexibility
Ensure holistic & effective design; support governance by developing policies, procedures, and processes
Invest in training, staff recognition, on-boarding, team building

POLICY DEVELOPMENT AND MANAGEMENT

CAPACITY	Additional staffing in critical areas and vendor support		
EXPERTISE	Development of Legislation	★	Briefing for Capitol
CASH 4 COLLEGE	Increase workshops	★	Phase 1 of new system
RESEARCH	Shared capacity data with partners; added EDD		
COMMUNICATING RESULTS	Recreate Facts @ Fingertips reports	★	Dist. data reports monthly to various entities



Continue to recruit and retain high quality staff
Strengthen relationship with Legislature, LAO, Administration, and other stakeholders
Develop an outreach plan and reports to improve outreach efforts
Consider developing Agency wide research agenda
Update Commissioners and Executive staff; update past due reports; develop data standards; evaluate report development release plan

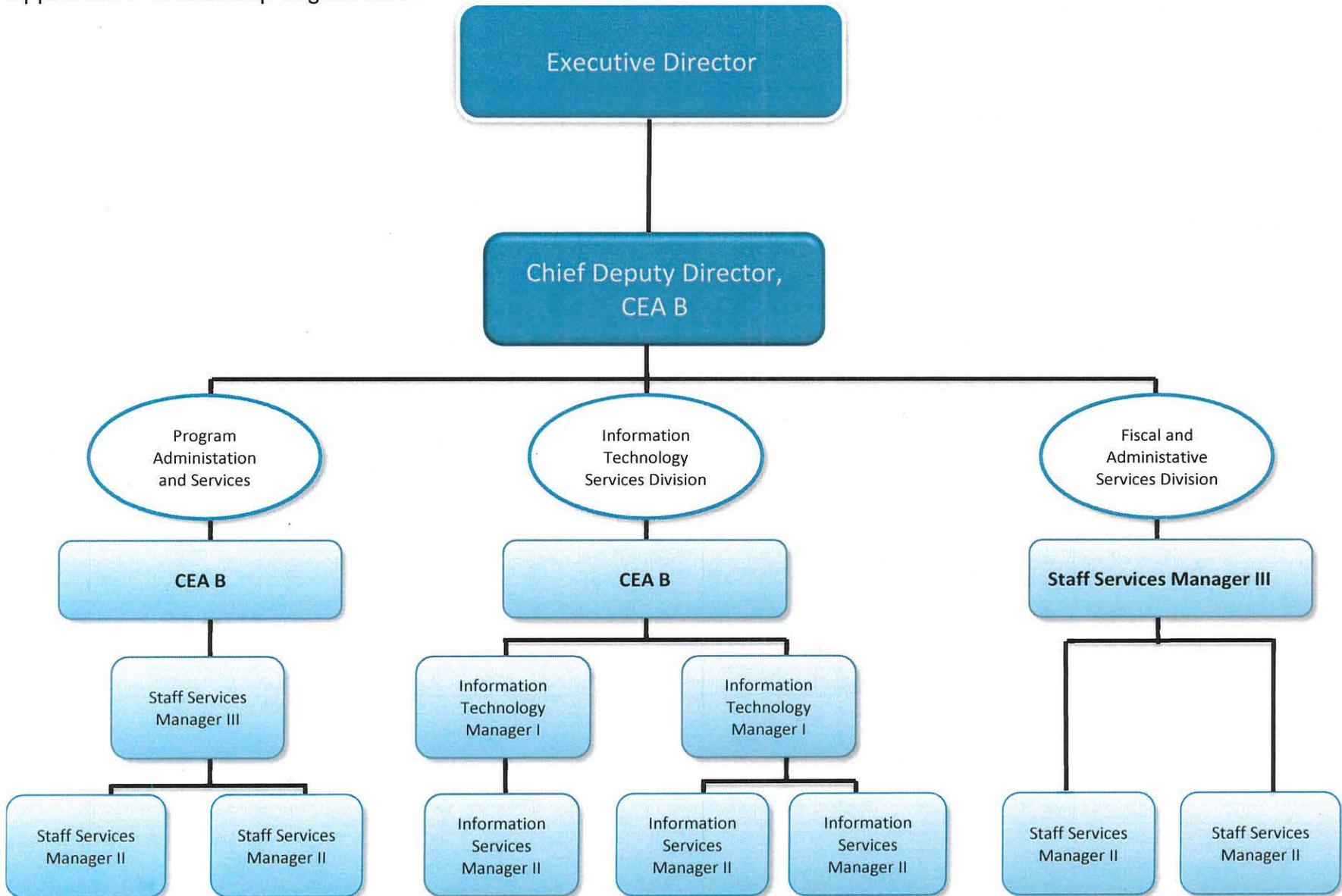
ADVOCACY DEVELOPMENT AND MANAGEMENT

REPUTATION & REACH	Meetings with key policymakers in June 2017		
PARTNERSHIPS	Early FAFSA/ Dreamers filers increased by 19%		
	Secured legislative action to add flexibility and \$ to Cal Grant Program	★	
COMMISSIONERS & AMBASSADORS	Provide weekly summaries and budget reports	★	
	Added teleconference meeting in April for leg. purposes		



Continue advocacy to simplify FAFSA	★	Improve data sharing with Fed. Gov't.
★	Protect financial aid programs from elimination	
Complete Get Schooled agreement for texts; complete video vignettes	★	
Enter into partnerships to increase availability and accessibility to financial aid		
Ensure information that Commissioners find valuable and useful continues to be provided; identify additional information to support their advocacy and ambassadorship		

Appendix B: Leadership Organization



Appendix C: Action Plan

Initiative <i>What is the name of the initiative?</i>	Gap <i>Which workforce planning gap does the initiative address?</i>	Responsible Person(s) <i>Who is responsible for overseeing successful implementation of the initiative?</i>	Performance Indicators <i>How will we know we achieved our goal and what will success look like?</i>	Due Date <i>When will it be completed?</i>	Strategic Alignment <i>Which Strategic goal(s) does the initiative support?</i>
One to Two Year Initiatives					
Create Employee Recognition Plan	Retention	HR Manager and HR Analyst	Create an Employee Recognition plan that will increase morale of staff based on recognition. This will result in, staff feeling valued and appreciated for their efforts	4 th Qtr. 2018	Recognition and Celebration
Create an Exit Survey	Retention	HR Analyst	Information provided through survey collection will allow management to improve internal conditions and turnover will be reduced.	4 th Qtr.2018	Communication
Teambuilding Between Divisions	Retention	Executive Director and Chief Deputy Director	This initiative should result in a collaborative and friendly working environment, with open communication between all staff members.	Ongoing beginning April 2018	Communication
Create a Value Statement	Retention	Executive Director and Chief Deputy Director	The value statement will list the principles and ethics to which the Commission will adhere. These principles and ethics will help guide in determining what is right and wrong, forming an ethical foundation. Expectations of staff behaviors will be guided through use of the value statement.	2018	Communication

Initiative <i>What is the name of the initiative?</i>	Gap <i>Which workforce planning gap does the initiative address?</i>	Responsible Person(s) <i>Who is responsible for overseeing successful implementation of the initiative?</i>	Performance Indicators <i>How will we know we achieved our goal and what will success look like?</i>	Due Date <i>When will it be completed?</i>	Strategic Alignment <i>Which Strategic goal(s) does the initiative support?</i>
Create and Implement an On-Boarding Program	Retention	HR Analyst and Division Designees	Onboarding makes employees feel welcomed and appreciated, provide a knowledge base of the Agency. Feedback will be requested to consistently improve the program.	2019	Communication
Implement a Cross-Training Plan	Knowledge Transfer	Division Chiefs and Designees	Rotational assignments allow staff to expand their knowledge of other assignments. System knowledge is strengthened resulting in a reduction in loss of knowledge due to turnover,	2019	Professional Learning
Create an Annual Training Plan	Professional Development	HR Manager and HR Analyst	Staff receive training appropriate to their classifications, job assignments, and upward mobility goals. Staff are informed and updated through training.	2018	Professional Learning
Review Duty Statements	Professional Development	Managers, and HR Analysts	All duty statements will be reviewed, compared to actual work processes and revised accordingly. This will help with training needs and competencies.	Ongoing beginning April 2018	Business Process Improvements
Three to Five Year Initiatives					
Develop a Competency Based Development Guide	Succession Planning	HR Analyst	Training needs will be better addressed; staff will be able to self-identify their training needs resulting in a capable, efficient and service oriented staff	2020	Professional Learning
Develop and Update Policies and Procedures	Knowledge Transfer	Division Designees, Legal and HR Manager	Establishing and updating policies provides staff with accurate and concrete guidelines, and protects the agency and staff by ensuring the agency	2020	Business Process Improvements

Initiative <i>What is the name of the initiative?</i>	Gap <i>Which workforce planning gap does the initiative address?</i>	Responsible Person(s) <i>Who is responsible for overseeing successful implementation of the initiative?</i>	Performance Indicators <i>How will we know we achieved our goal and what will success look like?</i>	Due Date <i>When will it be completed?</i>	Strategic Alignment <i>Which Strategic goal(s) does the initiative support?</i>
			is adhering to laws, rules and regulations.		

Chief Executive Officer Signature

Date

print name

Human Resources Director Signature

Date

print name

Appendix D: Communication Plan

Responsible Person(s) <i>Who is Responsible?</i>	Strategy <i>How will the information be communicated? What modalities will be used?</i>	Audience and Purpose <i>Who is the intended audience? What is the desired outcome for the intended audience?</i>	Target Date(s) <i>When will it be completed?</i>	Additional Training Required (yes/no)
Executive Director and Chief Deputy Director	Communications to all staff via emails	All staff will be notified of team-building activities to take place during agency events. Staff will be encouraged to participate and provide their own suggestions to build a more collaborative work environment.	Ongoing events beginning April 2018	No
Human Resources Manager	The HR Manager will notify appropriate staff what their role will be via meetings.	All Division/Chiefs. The desired outcome will be staff who understand the purpose of the WFP and their part in its success.	Ongoing	No
Human Resources Analyst	The HR Manager will verbally relay to the HR Analyst what she will be responsible for completing in the WFP.	The HR Analyst will complete or participate in the completion of six of the initiatives.	Ongoing	No
Division Chiefs	Division Chiefs will notify Managers/Supervisors via meeting with either the HR Manager or HR Analyst in attendance.	Division Chiefs will participate in the development of policies and procedures, cross training plan and teambuilding initiatives.	Ongoing	No
Managers/Supervisors	Managers/Supervisors will meet with individual staff that will be assisting (if any)	Managers/Supervisors will work with staff to identify needed revisions to duty statements.	Ongoing	No
Staff	Staff will be met with individually if needed	Feedback on progress.	Ongoing	No
Legal	HR Manager will notify via e-mail	Review revised policies.	Ongoing	No

Contact Information

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