Advancement Workgroup Report

This report is brought to you by the 2022-2023 Council of UC Staff Assemblies (CUCSA), Advancement Workgroup.

2022-2023 CUCSA Advancement Workgroup Members

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Executive Summary

In recent times, employee retention has proven challenging to public and private employees alike, particularly as a result of The Great Resignation. When combined with over 5,000 vacancies in UC systemwide, challenges with retention have serious implications for the UC as it can impact productivity levels, employee engagement, and the overarching psychological well being of our community. However, it is equally clear that a multi-tiered approach is needed to address this issue as well. With this in mind, CUCSA chose to focus on Staff Retention from three key lenses: Total Compensation, Staff Advancement, and Wellness and the Staff Experience. This report details the findings of the Staff Advancement workgroup.

Charge

The Retention via Advancement workgroup was charged with the creation of a general framework for addressing employee retention through the lens of advancement. Our workgroup was further charged with identifying local and systemwide resources for employees as well as supervisors to use related to advancement. The big question the advancement workgroup sought to answer was: how can our current advancement infrastructure be refined and enhanced to help retain University of California staff? Additional questions posed and discussed include:

- How can addressing talent advancement positively impact retention in the University of California?
- How does the University of California perceive advancement, specifically when a University of California employee moves between campuses and/or locations?
- How are current system resources leveraged?
- What does policy allow for advancing University of California employees?
- What resources are currently available for supervisors to help their employees advance?

- Are there any local practices that can be applied system-wide?
- What campus access exists for system level initiatives such as UC Coro?
- What process is in place that allows for the creation of new advancement opportunities?

Project Scope

To start this project, our workgroup reviewed materials provided by the CUCSA executive board, analyzed previous reporting by CUCSA related to compensation and retention, and read through the 2021 CORO report on Advancing UC: Retaining our Workforce. Using these resources and through our own efforts, we aimed to determine continuity in practices and gaps within the UC campuses and locations. At the end of this workgroup report we will outline specific recommendations for the following entities: UC Board of Regents, UC President, UCOP Systemwide Human Resources, Council of Chancellors, Campus/Local Human Resources Office, and Campus/Location Senior Management. We will outline basic resources for individuals to be aware of professional development and advancement opportunities systemwide. We will outline recommendations for supervisors on how they can assist with staff advancement opportunities and why it is important to have these opportunities for staff.

Methodology

The advancement workgroup found the CORO Report on Advancing UC: Retaining Our Workforce, very helpful. Instead of creating an entirely new strategy we found alignment with the key themes and recommendations the CORO report provided. It outlined five key themes important to retaining talent:

- Adopt a Relational Rather than a Transactional Management Approach
- Invest in Employee Training and Development
- Provide Reasonable Scheduling Flexibility

- Offer Competitive Compensation
- Streamline Processes for Resources and Retention

It also provided recommendations that we used to help inform our work. We created a table on the recommendations from the CORO report and focused on the following recommendations for the scope of our workgroup:

- Recommendation A: Increase engagement among supervisors, managers and human resources staff to enhance shared knowledge of career advancement policies and best practices
- Recommendation C: Make internal recruitment and promotion procedures clear and accessible for all
- Recommendation E: Actively promote systemwide tools and resources

As a group we identified areas of focus that we decided our workgroup could take on over the course of the academic year:

- Meeting with UC Leaders & CHROs
- Find and promote existing resources
- Career coaching
- Mentorship programs
- Career tracks

We chose these areas because they all were relatively accessible to acquire information about and they are areas where we have more opportunity to make an impact. There are many areas that advancement focuses on, but many of them fall under the wheelhouse of human resources and are not always directly accessible to the scope of work. This is why we chose meeting with CHROs and continuing to foster CUCSA's relationships with individual location and systemwide HR as a primary goal. The

strategy for these areas of focus was to learn more about each of the areas, provide an overview to others on what each of them look like, and offer recommendations on continued engagement and strategies for each area.

Defining the Issue

Close to half (43%) of respondents to UC's spring 2021 Employee Engagement Survey reported that they are considering leaving UC. According to the CUPA-HR 2022 Higher Education Employee Retention Survey, 30 percent of respondents seek new work opportunities because they want a promotion or additional work responsibilities. Further, the Advancing UC: Retaining Our Workforce report by CORO referenced a 2014 IBM study that revealed "employees who do not feel they are developing at a company are 12 times more likely to leave it." Advancement opportunities are a key factor in employee retention. By focusing on retention through advancement, and leveraging recommendations from the CORO report, this workgroup targets an issue that significantly contributes to staff consideration of whether they remain at UC.

Charge

While retention through advancement is a large task for six staff members to tackle in time they volunteer to UC, our group set out to at least accomplish three main priorities: start a conversation with CHROs around advancement opportunities, highlight what opportunities already exist, and provide recommendations for ways to better support our employees through advancement. We believe through our conversations with UC leaders, research on what is being done, and discussions with delegates on what can be improved, we were able to get the ball rolling in regards to this topic. We hope that future working groups can continue to focus on the larger issue of retention through whatever means possible, as it remains a huge issue for us systemwide.

Areas of Focus

Meeting with UC Leaders & CHROs

We decided to come up with a common agenda for staff to use when meeting with their CHROs or UC leaders to talk about advancement opportunities for UC staff. The agenda we used is focused on asking about responses to the CORO report on advancement, planned initiatives and strategies around advancement they would like to share, and any advice they have on creating more advancement opportunities for staff. Our main findings included that CHROs tended to be familiar with the CORO report, some measures for advancement are being taken (e.g. JDXpert - new automated job description system for managers with targeted roll out end of May 2023), professional development and staff enrichment programs exist at some locations and vary greatly, and there was an acknowledgement of staff issues and willingness to create more opportunities to increase advancement opportunities. We look forward to a continued dialogue with CHROs on these topics.

As a workgroup we met with UC-wide leaders as well. Main highlights from these meetings included:

- The supervisor plays a huge role in understanding what an employee wants to do, providing them with opportunities, and being their advocate. We need to focus on the quality of supervisors and provide training for them.
- Staff fellowship programs that allow staff to try out another position within the organization require funding but can be helpful in retaining staff and giving staff opportunities to see themselves in other areas within the organization.
- Training directors at each UC location can partner with staff organizations like CUCSA to strategize on what to prioritize for staff training.

- CUCSA can help UCOP and locations share information on how to navigate and find career track information for reclassification and advancement.

There is further opportunity for meetings and collaboration between CUCSA, HR, and training directors at each location to discuss how to make advancement opportunities more accessible for staff.

Find & Promote Existing Resources

As part of the University of California's mission to provide public service and advance knowledge, the University of California provides education and training to its employees and the public. The Retention via Advancement Workgroup recommends that Systemwide Talent Management facilitate additional integrated talent management strategies in collaboration with location partners to further address shared priorities, leverage best practices, and eliminate redundancies across the University of California's human resources enterprise. The Retention via Advancement Workgroup has identified the following existing professional development resources to be promoted for utilization by managers and staff across the University of California to encourage advancement and promotion from within the University of California.

1. <u>Talent Management Courses</u>
    a. UC Managing Implicit Bias Series: The UC Managing Implicit Bias Series is a six-course online training series designed to increase awareness of implicit bias and reduce its impact.
    b. Search Advisory and Hiring Committee Best Practices: The Search Advisory and Hiring Committee Best Practices online course explores the important roles of committee chairs and members, provides strategies for ensuring an equitable process, and addresses laws and UC policy that govern

hiring practices. It is recommended for individuals and committees engaged in search advisory and/or hiring functions.

2. People Management Series and Certificate
    a. The UC Systemwide People Management Series and Certificate is a program for all People Managers consisting of Core and Elective Courses, which includes local and systemwide programs and eCourses, as well as in-person learning experiences, and covers the following topics: Performance Management, Managing Implicit Bias, Managing People, Administration & Operations, Change Management, and Communications.
3. UC Management Skills Assessment Program (MSAP)
    a. The Management Skills Assessment Program (MSAP) is designed to strengthen the engagement and preparation of high potential UC supervisors, managers, and professionals. It offers an intensive, off-site, assessment center experience for early career managers.
    b. The program guides participants through a series of structured exercises and simulations observed by trained assessors who offer feedback about observed strengths and development areas.
    c. Subsequent, collaborative work after the program between the assessee participant and his/her/their sponsoring manager fine tunes a professional development plan designed to optimize assessment feedback.
4. UC Women's Initiative for Professional Development
    a. The UC Women's Initiative for Professional Development (UC WI) is a unique, experiential, systemwide professional development program to support the success and advancement of mid-career, woman-identified professionals and is open to all employees who support and are committed to this mission.

   b. The program brings together participants from every UC location.
   c. Participants represent faculty, academic personnel and staff, people managers, and non-people managers.

5. UCB Next Opportunity at Work (NOW) Conference
   a. The UCB Next Opportunity at Work (NOW) Conference is designed to support University of California staff with career and professional development through inspiring keynote speakers, workshops, community building with peers, and career planning resources.
6. UCR Staff Conference
   a. The UCR Staff Conference is a two-day virtual event created by UCR staff for UC staff, co-hosted by UCR Staff Assembly, Leaders of Excellence and Distinction (LEAD), and Human Resources Employee and Organizational Development and is available to all University of California staff at no cost.

Through collaboration and promotion of existing professional development resources, we can increase opportunities for advancement, promotion, and potential for leadership positions, thus retaining our talented and dedicated University of California staff.

Career Coaching

Career coaching is a valuable tool and resource to attract, retain, and advance staff. Upon review, this working group discovered that less than half of UC locations offer career coaching to staff (see below list).

Our colleagues at UC Berkeley offer career coaching and have compiled metrics to show the effectiveness and success of career coaching through surveys of staff who have received coaching. Following are highlights of these metrics:

- 77% of respondents felt better equipped to take action in their career development
- 70% of respondents reported increased confidence to achieve their career goals
- 67% of respondents reported increased confidence in their ability to identify fitting career opportunities

Therefore, this working group recommends that all UC locations offer career coaching to staff. If funding is a challenge to this recommendation, a further recommendation is that UC Systemwide assist UC locations by either offering career coaching through My UC Career or by providing funding to locations for this purpose.

Another recommendation is that career coaches be staffed within Human Resources at UC locations. The *Advancing UC: Retaining Our Workforce* CORO report describes how UC location procedures on how and when employees may advance in their careers are disparate, leading to frustration for staff and managers. A career coach who is familiar with HR procedures can mitigate this frustration by clearly describing and demystifying the promotion process to employees they coach.

The following is a list UC Locations with career coaching:

Location	Website	Program owner
UC ANR	n/a	
UCB	https://hr.berkeley.edu/grow/grow-your-career/main-offerings/career-coaching	Human Resources
UCD	n/a	
UCI	https://ce.uci.edu/can/coaching.aspx	UCI Division of Continuing Education

UCLA	n/a	
UCM	https://hr.ucmerced.edu/Career-Coaching	Human Resources Talent Development
UCR	n/a	
UCSD	https://blink.ucsd.edu/HR/training/career/index.html	Human Resources Staff Learning & Development
UCSF	n/a	
UCSB	n/a	
UCSC	https://shr.ucsc.edu/training/career_coaching.html	Human Resources Learning & Development
UCOP	n/a	
Berkeley Lab	https://sites.google.com/lbl.gov/postdocprogram/resources/postdoc-training-grant/coaching-options	Career Pathways - only for postdocs

Mentorship Programs

According to research from the Association for Talent Development (ATD), organizations with formal mentoring programs showed an increase in employee engagement and retention. Accordingly, most UC locations have formal mentorship programs, either centralized where the program is managed by a Staff Assembly, HR, etc., or decentralized where various departments/divisions manage their own programs. The working group desired to learn and share ways in which current UC location mentorship programs are succeeding and ways in which they may be improved. To obtain this information, the working group sent out a short survey to the

CUCSA delegation. Responses were received either from CUCSA delegates or from mentorship program coordinators.

Following are highlights of the survey responses:

Berkeley Lab: Training is required for the mentor and mentee. New Just-In-Time Mentoring program . Pilot was successful and a second event was planned for May 2023.

UCR: Mentors and mentees are hand-paired by the committee, making the program extra successful.

UCSC: Loose structure (after initial connection, meetings are at their discretion)

UCSB: Commitment of staff members is strong, but needs improvement and more mentors are needed based on mentee demand.

UCLA: Managed by Administrative Management Group, affinity group sponsored by HR.

UCSD: Organized by HR. Paused due to COVID and needs to restart

UCB: Coordinated by BSA Career Development Committee. 14 cycles to date with over 550 pairings of mentors and mentees

Through the survey we gleaned the following mentorship program best practices:

- Training for mentors and expectations for mentees
- "Speed-dating" style matching
- Meet-and-greet and social mixers are always helpful for engagement
- Feedback surveys at the end of each cohort

In order to improve existing mentorship programs, the following are recommendations from the working group:

- **To increase program awareness:**

    - Move the program to Human Resources rather than it being run by Staff Assembly. Request Human Resources develop a centralized program and website where only decentralized programs exist.
    - Add a list of location mentorship programs on the UC Net Professional Development website.
- **To address a shortage of mentors:**
    - Actively recruit more mentors by providing incentives such as gift cards, etc.
    - Adopt a group mentoring program. Can be especially beneficial when employees are seeking to expand a specific skill set
    - Adopt just-in-time mentoring

The following is a list with links to UC location mentorship programs:

Location	Website	Name of Program/Website	Sponsor / Program Owner
ANR	https://ucanr.edu/sites/Professional_Development/Career_development_tools/ANR_Mentorship_Program/	ANR Mentorship Program	Learning and Development
UCB	https://bsa.berkeley.edu/committees-programs/career-development-and-mentorship-committee/mentorship-program	BSA Mentorship Program	Staff Assembly
UCD	https://hr.ucdavis.edu/departments/learning/programs/group-mentoring	UC Davis Group Mentoring Program	Human Resources
UCI	n/a	n/a	No centralized program or website. Departments have their own programs.

UCLA	https://chr.ucla.edu/lod-mentoring-resources	Mentoring Resources for UCLA Staff	Human Resources hosts a site with links to resources. Only one department at location has a formal program.
UCM	https://hr.ucmerced.edu/training/camp	Career Advancement Mentorship Program (CAMP)	Human Resources
UCR	https://hr.ucr.edu/employee-and-organizational-development/highlander-mentor-connection	Highlander Mentor Connection	HR, Leaders of Excellence and Distinction (LEAD), Academic Management Professionals (AMP)
UCSD	https://blink.ucsd.edu/HR/training/career/CC/mentorship/index.html	Staff Mentorship Program	Human Resources
UCSF	https://learning.ucsf.edu/mentorship-programs	Mentorship Programs at UCSF	Learning and Organization Development hosts a site with links to various mentorship programs, including a program offered by L&OD.
UCSB	https://gauchomentor.staffassembly.ucsb.edu/	Gaucho Mentor Connection Program	Staff Assembly
UCSC	https://sab.ucsc.edu/outreach-committees/mentorship-program.html	Staff Mentorship Program	Staff Advisory Board
UCOP	https://www.ucop.edu/local-human-resources/your-career/cohorts/ucop-mentorship-program.html	UCOP Mentorship Program	Human Resources
Berkeley Lab	https://sites.google.com/lbl.gov/mentoringlbnl-jit?pli=1	Mentoring@LBNL	Career Pathways Office and IDEA Office hosts a site with links to Area mentorship programs

Career Tracks

UCOP designated Career Tracks to standardize job titles across the university. "Career Tracks enables UC to define job titles consistently within each location and across the university except for Berkeley Lab. Levels for individual contributor, supervisory and management roles within each distinct functional area are defined consistently across occupations and with the labor market for comparable jobs. Career Tracks has many benefits for employees and managers, including:It gives employees better-defined career paths within their job functions." (UCOP Career Tracks). Each location is responsible for implementing them. In reviewing each location's website and materials, each location is at a different stage in rolling them out. At UCSF, UCSB, UCSD, and UC Santa Cruz, staff have access to view job descriptions in each functional area. At UC Berkeley, staff have access to a Job Builder tool that uses standard job requirements to build a job description template for a specific job level. To improve transparency, one recommendation would be to make all job descriptions and the Job Builder tool available across locations so staff can compare their job duties not just across their location, but across the entire university, easily see what opportunities they are eligible for, and help identify when they are working beyond their current scope based on their current classification level. JDXpert is a tool that is in development at UCLA to build job descriptions that are intended to be available systemwide (UCLA Key Initiatives). It was still in development at the time of this report.

Other career advancement opportunities offered are career pathway programs where staff can choose a specific career and receive training to move into a new career path. UCSF offers several Workforce Development Programs that offer training for IT, Medical Assistant, Certified Nursing Assistant, Clinical Research Coordinator and Practice Coordinator positions. (UCSF Workforce Development Programs) We requested but were unable to obtain utilization data for all of these programs by the time of this

report. Future work may want to explore these programs further to understand their impact on retention and evaluate feasibility for use at other locations and in other job disciplines.

Lastly, we put together a resource list of each location's Career Track information and career pathway programs. As future exploration, each location has a Training Director who can provide additional support around navigating career resources at their location.

Location	Website	Name of Program	Sponsor / Program Owner
UC ANR	https://msap.ucr.edu/	UC Management Skills Assessment Program (MSAP)	ANR Learning & Development
UCB	https://hr.berkeley.edu/grow/grow-your-skills	Grow Your Skills - Various Programs	Varies by Program
UCD	https://hr.ucdavis.edu/departments/learning/toolkits/career-mgmt/career-exploration	UCD Career Campus Initiative	Varies by Program
UCI	https://www.hr.uci.edu/partnership/careertracks/	UCI Career Tracks	UCI HR
UCLA	https://chr.ucla.edu/training-and-development/career-development-programs	Career Development Programs - Staff Enrichment Program (SEP) and Professional Development Program (PDP)	Campus Human Resources, Learning & Organizational Development
UCM	https://hr.ucmerced.edu/hrtdprograms	Career Development Programs	UCM HR
UCR	https://msap.ucr.edu/	UC Management Skills Assessment Program (MSAP)	UCR MSAP
UCSD	https://blink.ucsd.edu/HR/comp-class/classification/careertracks/	Career Tracks: Job Templates & Standards	UCSD HR
UCSF	https://hr.ucsf.edu/job-templates	Career Tracks: Job Templates & Standards	UCSF HR
UCSF	https://training.ucsf.edu/workforce-development-programs	Workforce Development Training Programs	Varies by Program
UCSB	https://www.hr.ucsb.edu/hr-units/compensation/career-tracks	Career Tracks: Job Templates & Standards	UCSB HR

UCSC	https://shr.ucsc.edu/training/talent-readiness-and-continuity/index.html	Talent Readiness And Continuity	UCSC HR
UCOP	https://www.ucop.edu/local-human-resources/your-career/index.html	UCOP Cohort Programs	UCOP HR
LBNL	https://pathways.lbl.gov/	Career Pathways	Laboratory Directorate - focus is on scientist/engineer and postdoc employees only
UCOP	https://ucnet.universityofcalifornia.edu/working-at-uc/your-career/career-tracks/index.html	Career Tracks	UCOP

Overall Recommendations

1. Partnership with HR
    a. Local staff assemblies and CUCSA delegates should have strategic partnerships with their locations' HR department that include regular meetings, involvement in engagement strategies, and input on supervisory training.
    b. Have the local staff assembly be involved in the interview and onboarding process for the CHRO.
    c. Make sure that all UC supervisors make PPSM-50: Professional Development a priority for their employees.
2. Staff Mobility
    a. Speed up the process for reclassification, promotion, and granting stipends at each location. Include consistent timelines for these processes.
    b. Each location should look to grow examples of clear career pathways within departments to encourage staff advancement mobility.
    c. Develop a fellowship program at the different locations to support career mobility within the campus community.
3. Further Areas of Focus

a. For career coaching, our main recommendation would be to have career coaching available during onboarding for new employees and part of the yearly evaluation.
b. Mentorship programs should be prioritized and have regular input and financial support from OP which would then help grow these important networks of professionals dedicated to work in the UC system.
c. Systemwide Talent Management should facilitate additional integrated talent management strategies in collaboration with location partners to further address shared priorities, leverage best practices, and eliminate redundancies across the University of California's human resources enterprise. Existing professional development resources available to all University of California staff should be available on a centralized webpage and be promoted for utilization by managers and staff across the University of California to encourage advancement and promotion from within the University of California.
d. Make Career Tracks job descriptions and job builder tools available to all UC locations. Explore expanding UCSF career-specific training programs to other locations.

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