



# Workforce Strategic Planning – Understanding the Risks

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## Risk Assessment

Temecula *must* attract, develop, engage and retain the top talent we need to meet our organizational goals.

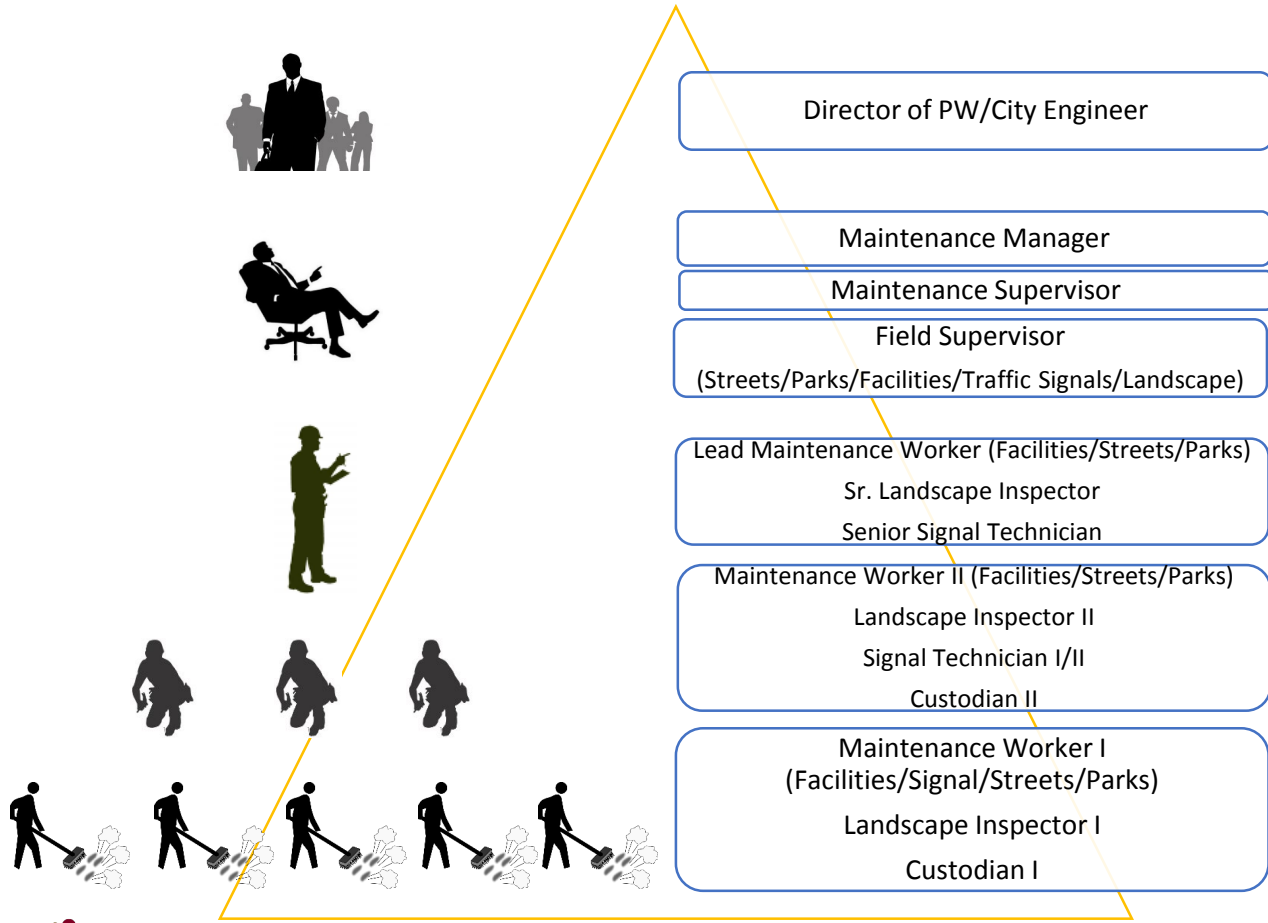
THE

# Art

OF RISK



## 46th Conference & Expo





# What is a Workforce Plan?

- A **strategic plan** for having the right **number** of people, with the right **skills**, in the right **jobs**, at the right **time**.
  - ✓ Business process that aligns staffing with the strategic missions and critical needs of the City.
  - ✓ Forecasts the City's future workforce needs to ensure the City will continue to have a talented competent workforce.



## Why is it Important?

- **Leadership:** Demonstrates City's commitment to employees and citizens of Temecula by planning and preparing for continuity of services long into the future.
- **Strategic Planning:** Determines whether the City's workforce is at risk for employee turnover. Builds the City's bench strength.
- **Customer Satisfaction:** Prepares for the future, sustains services and increases operational efficiency.

# Workforce Planning vs. Succession Planning

(Global Perspective)



- **Phase 1** : Set Strategic Plan
- **Phase 2**: Gather & Analyze Data
- **Phase 3**: Develop Strategies and Plan
- **Phase 4**: Implement Strategies
- **Phase 5**: Evaluate the Plan

(Individual Perspective)



- **Part 1**: Identify and Prioritize Leadership Positions
- **Part 2**: Identify Talent Pool Gaps
- **Part 3**: Develop Succession Planning Strategies



## City Benefits

- Identifies & addresses gaps & departmental needs
- Meet Council goals & objectives
- Employee commitment & higher retention rates
- Knowledge transfer
- Minimize workforce disruptions
- Efficient and productive workplace
- Informed decision making
- Controls miscommunication
- Improves performance and Accountability
- Identifies strengths & weaknesses
- Retaining a workforce best “fit”

## Employee Benefits

- Growth opportunity
- Employer commitment/loyalty
- Satisfaction
- Recognition
- Increased morale & motivation
- Long term planning
- Defined career progression map



# Workforce Profile: City of Temecula

(11/15/16)

- Population:
  - 139 full-time/2 part-time employees
  - 222 project employees during 2016 calendar yr. (not included in profile)
- 56% males ~ 44% females
- Average age of FT employee = 48 yrs. Old
- 49% (69 employees) 50+ years old
- 18% (26 employees) within 5 yrs. of turning 50





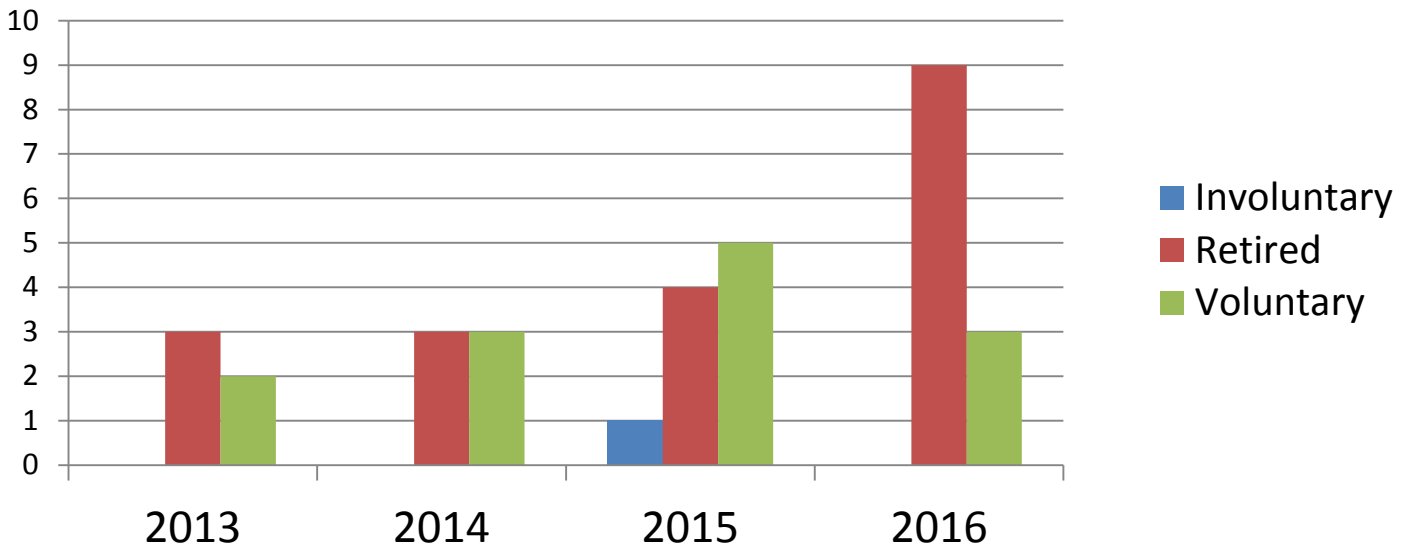
# High Risk Classifications (Age 50+)

<b>City Clerk</b>	<b>3</b>	REVENUE MANAGER	1	SENIOR ENGINEER	2
OFFICE SPECIALIST	2	<b>Human Resources</b>	<b>2</b>	SENIOR LANDSCAPE INSPECTOR	1
RECORDS MANAGER	1	MANAGEMENT ANALYST	1	SENIOR MANAGEMENT ANALYST	1
<b>City Manager</b>	<b>2</b>	OFFICE SPECIALIST CONFIDENTIAL	1	SENIOR OFFICE SPECIALIST	1
ASSISTANT CITY MANAGER	1	<b>Information Technology</b>	<b>2</b>	SENIOR PUBLIC WORKS INSPECTOR	2
EXECUTIVE ASSISTANT	1	IT ADMINISTRATOR	1	SENIOR SIGNAL TECHNICIAN	1
<b>Community Development</b>	<b>10</b>	SENIOR IT SPECIALIST	1	<b>Support Services</b>	<b>3</b>
ADMINISTRATIVE ASSISTANT	1	<b>Public Works</b>	<b>32</b>	DEPUTY DIR OF SUPPORT SERVICES	1
ASSOCIATE PLANNER II	1	ADMINISTRATIVE ASSISTANT	1	OFFICE SPECIALIST	2
BUILDING INSPECTOR II	4	ASSISTANT ENGINEER	2	<b>TCSD</b>	<b>9</b>
BUILDING OFFICIAL	1	ASSOCIATE ENGINEER	5	COMMUNITY SERVICES DIRECTOR	1
COMMUNITY DEVELOPMENT TECH	1	CONSTRUCTION MANAGER	1	COMMUNITY SRVCS SUPERINTENDENT	1
SENIOR OFFICE SPECIALIST	1	FACILITY SERVICES MANAGER	1	COMMUNITY SRVCS SUPV I	1
SR CODE ENFORCEMENT OFFICER	1	JUNIOR ENGINEER	1	COMMUNITY SRVCS SUPV II	1
<b>Emergency Services</b>	<b>1</b>	LEAD MAINTENANCE WORKER	5	MUSEUM SERVICES MANAGER	1
COMMUNITY DEVELOPMENT TECH	1	MAINTENANCE SUPT. - P/W	1	PARK RANGER II	1
<b>Finance</b>	<b>5</b>	MAINTENANCE WORKER	2	SENIOR ADMINISTRATIVE ASST	1
ACCOUNTING ASSISTANT	1	MAINTENANCE WORKER II	2	SENIOR RECREATION COORDINATOR	1
ACCOUNTING MANAGER	1	PARK/LANDSCAPE MAINT SUPV	1	THEATER TECH COORDINATOR II	1
ADMINISTRATIVE ASSISTANT	1	PRINCIPAL ENGINEER	1	<b>Total</b>	<b>69</b>
PURCHASING MANAGER	1	PUBLIC WORKS DIRECTOR	1		



# Separation Trend

Average age of those who retired in the past 4 years was 56.3 years old with 18.8 years of service.





## Generational

- 19% Baby Boomers (1943-1960)
- 70% Generation X (1960-1980)
- 11% Millennials (1980-2000)
- Generation Z (2000-2016)
  - Although not part of profile, Globals ( are now entering the workforce.



# Understanding Generational Differences

Generation	Values	Attributes	Work Style
<b>Traditionalists</b>	Conformity Respects Authority Loyal/Dedicated	Detail oriented Disciplined Dislikes conflict	Consistency Seeks technological advances Prefers hierarchical organizational structures Effort rewarded
<b>Baby Boomers</b>	Personal gratification Equality Self-improvement Personal relationships Health/wellness	Optimistic Self-absorbed Avoids conflict Service Oriented	Immediate Rewards Achievement oriented “Workaholics” Process more important than results Difficulty with work/life balance. Work ethic = worth ethic
<b>Generation X “GenXers”</b>	Independence Honesty Work/life balance Informality Family/friends	Reliable Survivors Skeptical Need to know “Why” to understand purpose Technologically Savvy	Independent Adaptable Authority does not intimidate Effort given, but will not be taken advantage of.
<b>Generation Y “Millennials”</b>	Self-expression Respect must be earned. Marketing/Branding	Adapts quickly Needs change and challenge Resilient Committed/Loyal if dedicated to idea Acceptance of others Global perspective	Need to see big picture Work = self-expression Multi-taskers Seeks flexibility in schedules/environment Team work Continuous learning Expects Instant gratification Work-life balance Seeks active involvement
<b>Generation Z “Globals”</b>	Work Experience New Skills Mentorship Networking Internships	Realistic Persistence/Commitment Proactive Prefers Anonymity Connected	Practical Rewards Career Specialization Transparency

(ValueOptions, 2012) (Liebert Cassidy Whitmore, 2013) (JB Training Solutions, 2016)



## Current Approach

A variety of *independent* initiatives have been used over the years to address workforce needs.

City's Mission Statement

City's Value Statement

Quality of Life Master Plan

Administrative Guidelines

Personnel Policies

Memorandums of Understanding

Management Compensation Plan

Classification and Compensation Plan

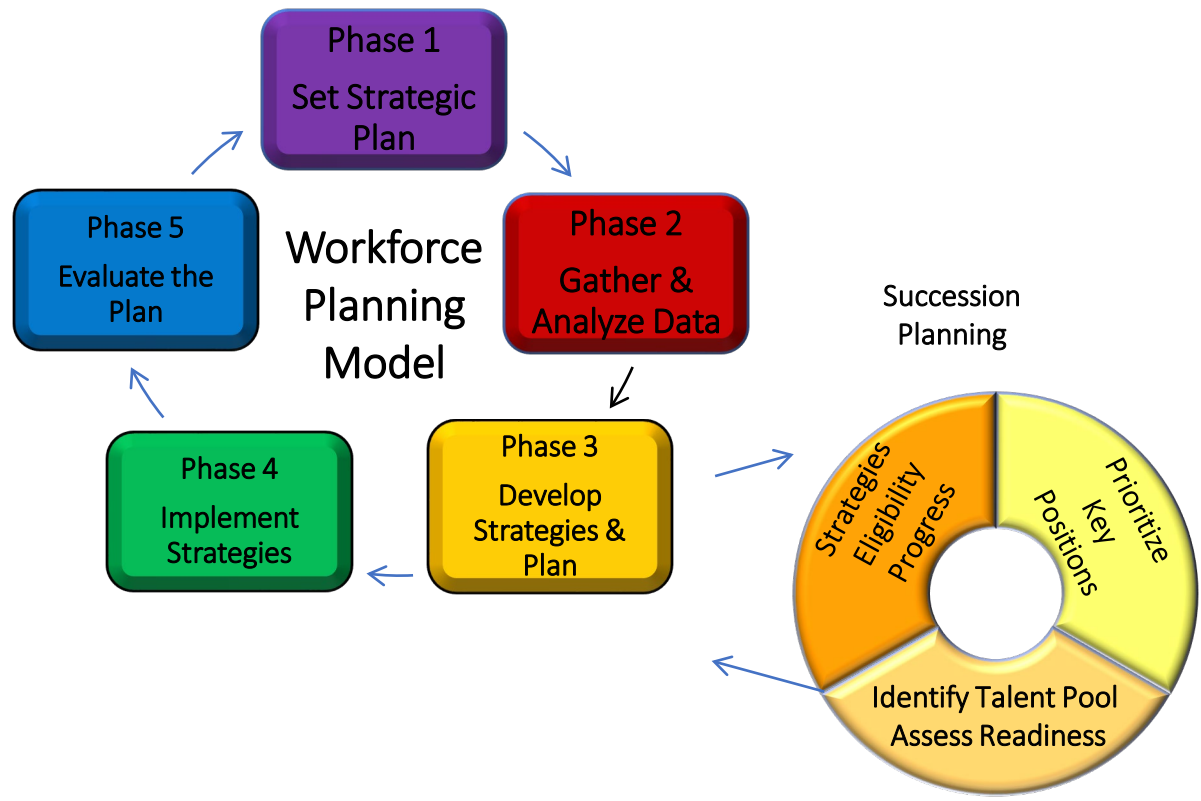
Performance Evaluations

Informal Succession Planning



# Beyond Analytics

Based on Cal HR's Five Phase Model







# Development vs. Advancement

“Bottom Up”

Open to  
development



City  
Manager

Director

Manager

Supervisor

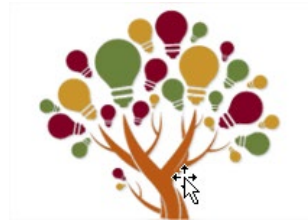
Line Staff

“Top Down”

Open to  
developing

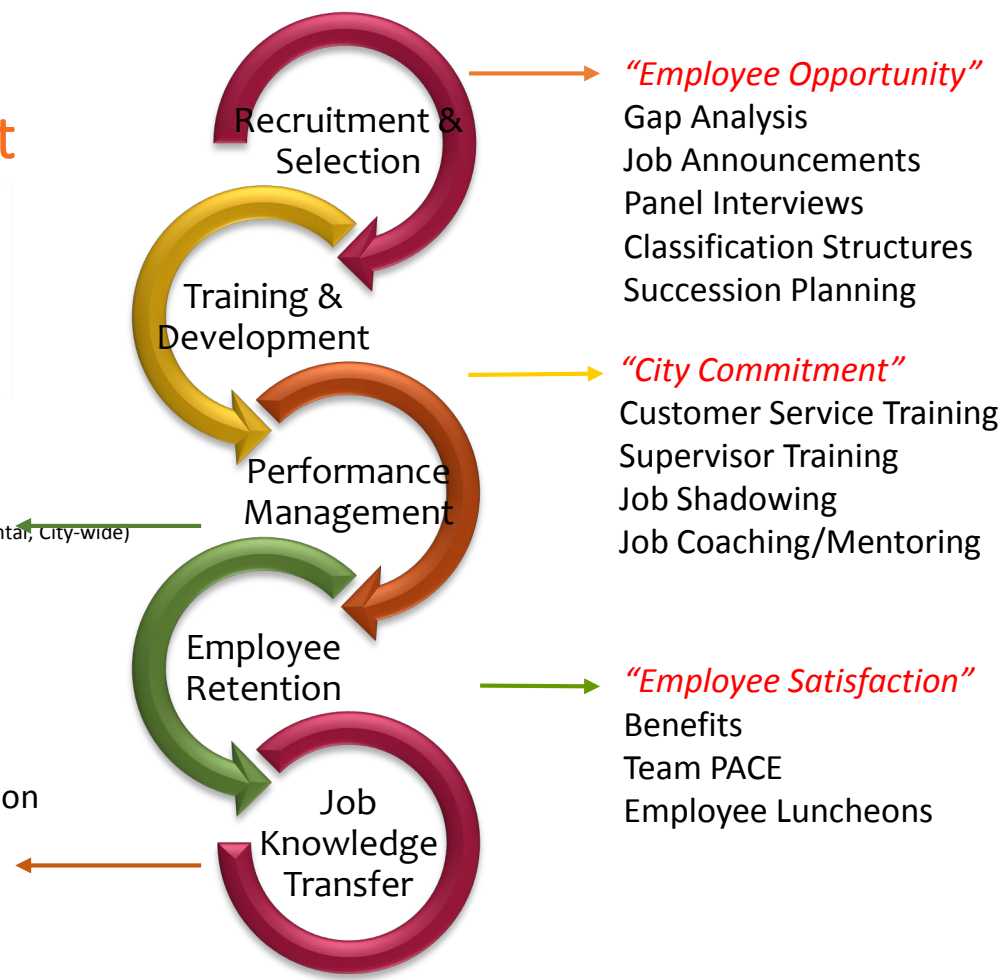


## Employee Growth Chart

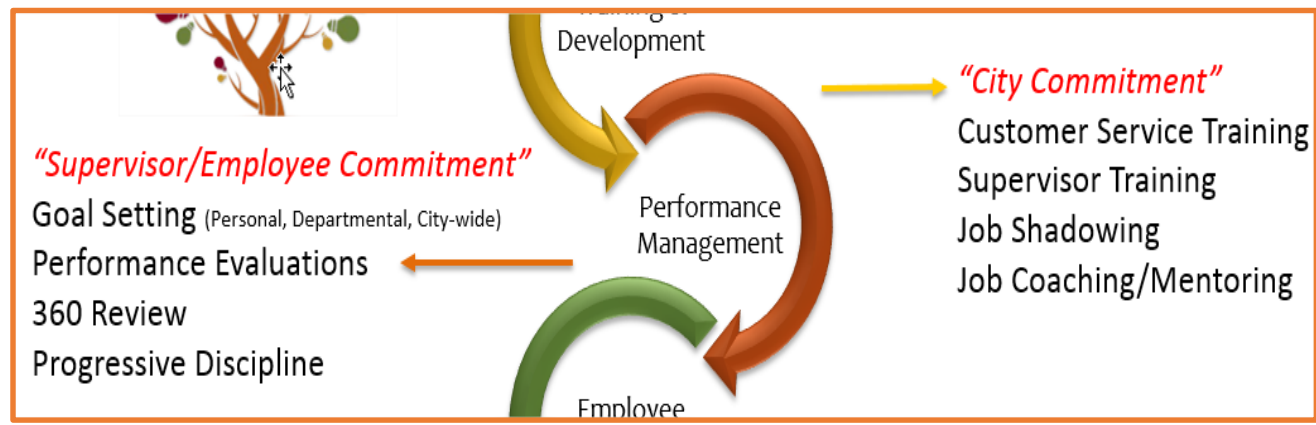


**“Supervisor/Employee Commitment”**  
 Goal Setting (Personal, Departmental, City-wide)  
 Performance Evaluations  
 360 Review  
 Progressive Discipline

**“Tradition”**  
 Oral/Written Communication  
 Legacy  
 Exit Interviews  
 Alumni Network



# Where the Rubber Meets the Road





# Workforce Strategic Plan





# NEW THIS YEAR – Surveys on the App

Find the App, Click on Events, Click on Browse by Day, Click on the Specific Session, Click on Rate Event. See Below for Screen Shots.

