Cal Answers

HR Census Reporting

Business Process Analysis Working Group

August 16, 2013
Welcome!

Jeannine Raymond
Assistant Vice Chancellor for Human Resources
Presenters

- **Loraine Binion**: Executive Director; University Relations Administration and Finance and Project Manager; University Relations Equity, Inclusion, and Diversity Core Planning Team

- **Andrew Eppig**: Institutional Research Analyst; Division of Equity and Inclusion

- **Tim Abdellah Fuson**: Equal Employment Opportunity Analyst; Human Resources Department

- **Bené Gatzert**: Strategic Initiatives Manager; University Health Services

- **Elizabeth Gillis**: Director of Strategic Initiatives; Division of Equity and Inclusion
Agenda

- Overview of Cal Answers and HR Census Reporting
- HR Census Reporting in action
- Learning and engagement resources
How many employees work at UC Berkeley?
A. 6,719
B. 8,477
C. 19,519
D. 30,057
You’re ALL correct!
Counting people is complicated ...
Life before Cal Answers ...

- **Data silos:** one or a few people with specialized access in one realm
- **Fragmented views:** no one sees the full picture
- **Fragile interconnects:** a tangled web of data traded between analysts
- **Limited analysis tools:** not standardized
HR Workforce Census (on hrweb.berkeley.edu) offered standardized counting methodology and made counts available to all but ... only in limited categories, in discrete PDFs, with no drill-down capabilities
Life after Cal Answers ...

Web-based, analytical tool with:
- Interactive dashboards
- Well-defined metrics selected by campus subject matter experts
- Strategic direction for enterprise data

Accessible to entire campus

Use it to:
- Monitor goals
- Improve processes
- Inform strategic decisions
- Communicate about campus
How does Cal Answers HR Census Reporting fit within the context of other campus HR analytical tools?

<table>
<thead>
<tr>
<th>Cal Answers</th>
<th>BAIRS</th>
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<tr>
<td><strong>DATA</strong></td>
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<td>Workforce headcounts and trends</td>
<td>Workforce detail and transactions</td>
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<td><strong>PURPOSE</strong></td>
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<td>General workforce analysis and management</td>
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<td><strong>USERS</strong></td>
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<td>UC Berkeley campus</td>
<td>Designated analysts within departments</td>
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What does HR Census Reporting tell us about how many staff work for UC Berkeley?
What does HR Census Reporting tell us about trends in job growth or decline for career and contract employees?
What does HR Census Reporting tell us about how many faculty in the College of Letters and Science, Division of Mathematical and Physical Sciences are women?
What does HR Census Reporting tell us about the aging of campus managers and supervisors?
Elizabeth Gillis
Director of Strategic Initiatives,
Division of Equity and Inclusion
2009: campus adopted strategic plan for equity, inclusion, and diversity as part of Initiative for Equity, Inclusion, and Diversity* focused on:

- Embedding principles of equity and inclusion into campus daily life
- Ensuring equitable access to education and employment
- Fostering a climate that allows all in our diverse community to thrive

2010: Division of Equity and Inclusion launched “pilot” program to develop planning process for equity, inclusion, and diversity at department level

2013/14 Academic Year: about 18 academic departments** and 7 administrative units will have strategic plans

*The UC Berkeley Initiative for Equity, Inclusion, and Diversity is made possible by the generosity of the Evelyn and Walter Haas, Jr. Fund.

**Academic units undergo this process as part of their Academic Program Review process (http://vpapf.chance.berkeley.edu/apr/).
Data gathering and analysis

Types of data collected by departments and divisions
• Client or marketing surveys
• Exit or entry surveys
• Staff or workplace climate surveys (internal to unit)
• Performance management and professional development records
• Program or service assessments

Types of data collected by campus
• Campus climate surveys
• Campus Affirmative Action Plan
• Workforce demographics
Workforce demographics connect to strategic planning

Campus strategic plan long-term expected outcome: staff at all levels, including the executive and management levels, reflect the rich diversity of national and local talent pools

- Departments and divisions are expected to show how they support this goal through their own activities and objectives

- Data are not “good” or “bad:” data allow departments to know more about their talent pool and to view trends over time

- Data open the door to conversations about critical issues, such as:
  - Equitable access to jobs and advancement
  - Inclusive and transparent hiring and advancement practices
  - Succession and professional development planning
  - Effects of perception(s) of equity and fairness in the workplace
Examples of current strategies and objectives for administrative units

**Strategy:** Develop new practices and checklist on hiring and advancement

**Related objective:** Systematic approach to talent management and succession planning integrating equity, inclusion, and diversity best practices

**Strategy:** Actively engage current managers in mentoring non-managers

**Related objective:** Increase percentage of staff leadership positions held by woman and staff of color
Loraine Binion
UREL Executive Director; Administration and Finance and
UREL Project Manager; Equity, Inclusion, and Diversity Core Planning Team
Development Phase (May 2012)
HR’s Rich Lau and Tim Abdellah Fuson presented University Relations’ (UREL) census data and campus Affirmative Action goals to UREL’s internal Equity, Inclusion, and Diversity Strategic Planning Team

Findings:
• Discovered opportunities to increase numbers of diverse applicants and hires at Professional and Management and Senior Professional Program (MSP) levels

• Identified Affirmative Action goals for underrepresented categories from Human Capital Management (HCM) system: “Female, American Indian/Alaskan native, Black or Hispanic, minority”
Case Study: University Relations

Implementation Phase (Present)
Specific actions from strategic plan are supported by UREL Vice Chancellor Scott Biddy and UREL senior management team to assist in meeting diversity and Affirmative Action opportunities:

- Increase coaching and customized assistance for hiring managers
- Hold periodic on-site recruitment briefings for hiring managers
- Expand existing recruitment advertising to target diverse candidates
- Monitor interview data forms to discover trends and insights
- Utilize summer intern to update 2006 database of 700+ candidates
Bené Gatzert
Strategic Initiatives Manager,
University Health Services
Case Study: University Health Services

Approaches to address disparities and gaps
- Improve recruitment and hiring practices
- Expand efforts to train more culturally competent staff
- Develop new metrics to assess outcomes at “customer/client” and “people/staff” levels

Examples of organization-wide implementations
- “Toolkit for Recruiting and Hiring a More Diverse Workforce”
- Minimum expectations of hiring managers
Turn to your neighbor. Discuss.

What metrics would you find valuable to help you with HR analysis?
Learning and engagement resources

Cal Answers HR Census Reporting
• **Information and log in:** calanswers.berkeley.edu
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Division of Equity and Inclusion
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  • Elizabeth Gillis, Director of Strategic Initiatives: egillis@berkeley.edu or 2-8828 (strategic planning for administrative units)
  • Amy Scharf, Planning and Project Analyst: ascharf@berkeley.edu or 2-8844 (strategic planning for academic units)