

# Cal Answers HR Census Reporting

Business Process Analysis Working Group

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# Welcome!

**Jeannine Raymond**  
**Assistant Vice Chancellor**  
**for Human Resources**

# Presenters

- **Lorraine 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

# Life before Cal Answers, continued ...

HR Workforce Census  
(on [hrweb.berkeley.edu](http://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?

## Cal Answers

### DATA

Workforce headcounts and trends

### PURPOSE

General workforce analysis and management

### USERS

UC Berkeley campus

## BAIRS

### DATA

Workforce detail and transactions

### PURPOSE

Particularized workforce analysis and management

### USERS

Designated analysts within departments

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

# Background on Equity and Inclusion strategic plan

**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

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

**Related objective:** Increase percentage of staff leadership positions held by woman and staff of color

# Lorraine Binion

UREL Executive Director; Administration and Finance  
and

UREL Project Manager; Equity, Inclusion, and  
Diversity Core Planning Team

# Case Study: University Relations

## 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 Bidy 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](https://calanswers.berkeley.edu)
- **Questions:** [calanswers-help@berkeley.edu](mailto:calanswers-help@berkeley.edu) or 661-9000

## Division of Equity and Inclusion

- **Information:** [diversity.berkeley.edu](https://diversity.berkeley.edu)
- **Questions:** [equity\\_inclusion@berkeley.edu](mailto:equity_inclusion@berkeley.edu)
- **Contacts:**
  - Andrew Eppig, Institutional Research Analyst: [aepig@berkeley.edu](mailto:aepig@berkeley.edu) or 2-6663 (Cal Answers and diversity-related data)
  - Elizabeth Gillis, Director of Strategic Initiatives: [egillis@berkeley.edu](mailto:egillis@berkeley.edu) or 2-8828 (strategic planning for administrative units)
  - Amy Scharf, Planning and Project Analyst: [ascharf@berkeley.edu](mailto:ascharf@berkeley.edu) or 2-8844 (strategic planning for academic units)