



Agenda Item 8

June 16, 2015

ITEM NAME: Organizational Health Index (OHI) Survey Update on Follow-Up Initiatives

PROGRAM: Human Resources Division

ITEM TYPE: Information

EXECUTIVE SUMMARY

The purpose of this agenda item is to provide an update on the programs, processes, and strategies that have been implemented as a result of OHI, as well as an overview of next steps.

STRATEGIC PLAN

The OHI survey supports Goal B in the Strategic Plan – Cultivate a high-performing, risk intelligent and innovative organization.

BACKGROUND

The Organizational Health Index (OHI) is an employee opinion survey used to measure the health of an organization. CalPERS first administered the OHI survey in 2010 and the survey was given again in 2013. The OHI survey measures outcomes and practices that contribute to CalPERS overall health score, which helps us to understand what we are doing well and where we can improve as an organization.

Executive staff reviewed and analyzed results from the 2013 OHI survey and identified three areas in need of improvement throughout the enterprise: accountability, capabilities, and innovation. Throughout 2013 and 2014, two cross-functional action planning teams were formed to address the enterprise-wide gaps identified through the OHI survey. The Accountability Team focused on “role clarity” and “process-based capabilities” and the Innovation Team focused on “employee-based innovation.”

ANALYSIS

The outcome of the work done by the Accountability and Innovation teams culminated in the development of programs, processes and strategies that address role clarity, process-based capabilities, and innovation. The following are a few of the improvements that have been made.

Effective January 1, all manager and supervisor performance evaluations have a new section for role clarity and process-based capabilities, calling for them to ensure staff

have the training and tools needed to do their jobs, and critical business processes and procedures are documented.

The Supervisory Skills Enhancement (SSE) series curriculum originates from our Leadership Essentials and Direction for your Emerging Role (LEADER) series. The SSE series was developed as “refresher” training for management who took LEADER years ago or for new managers awaiting enrollment in LEADER. The LEADER series satisfies the completion of 80 hours of basic supervision training for new managers and supervisors as required under Government Code 19995.4. The new SSE curriculum focuses on important topics, such as communicating job expectations, delegating to staff, and strategies of fostering a culture of responsibility. Three workshops were completed (Hiring Overview, Performance Management and Coaching, and Positive Employee Relations) and all are available as web-based and instructor-led training.

Mentor Your Manager is a unique program that is part of our Informal Mentoring initiative and provides the opportunity for staff to share their expertise and increase manager awareness of some of the daily challenges they face as part of their job. Mentor Your Manager Week was held in April and will continue to be an annual activity.

The Enterprise Internal Innovation (EII) Team continues to focus on employee-driven innovation. The EII Program is a direct result of employee feedback in the OHI survey where staff indicated they want an environment that fosters innovation and creativity on the front lines.

The EII Team is currently piloting the program and working on developing a platform using The Spark that allows staff to submit their ideas and encourages open communication throughout the organization. All ideas submitted through the program will include at least one of the following benefits: increase morale, improve communication, improve a process or procedure, improve customer service, provide long-term time savings, or provide long-term cost savings.

Staff of all levels from across the enterprise are providing valuable feedback about the program’s ideation process. The EII Team is currently compiling feedback and making adjustments to the program accordingly. The EII Program is expected to begin incrementally launching in December 2015, and will be available enterprise-wide by June 2016.

Next steps involve enterprise-wide communication to create awareness that concerns raised in the 2013 OHI Survey have been heard and will continue to be addressed. Staff will continue to be informed of the programs, processes and strategies implemented as a result of OHI. In addition, staff will begin to plan for the next OHI survey which is scheduled to be administered in Spring 2016.

BUDGET AND FISCAL IMPACTS

Funding has been approved for the administration of the next OHI survey in Spring 2016 as part of the budget for FY 2015/16.

BENEFITS/RISKS

The benefits of implementing these new programs include increased accountability on the part of management and staff, improvement in role clarity, and greater openness in the sharing of new ideas across the enterprise.

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