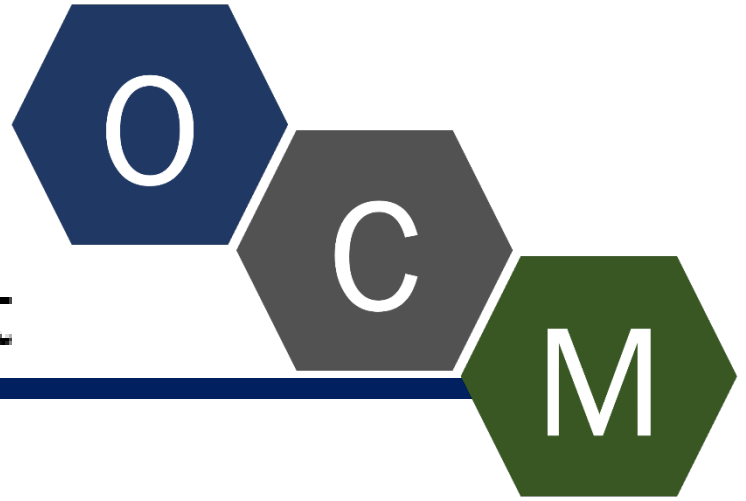
Building

“The CalSTRS way of managing change”

Teachers Retirement Board Update | March 7, 2024

CALSTRS®

Organizational Change Management



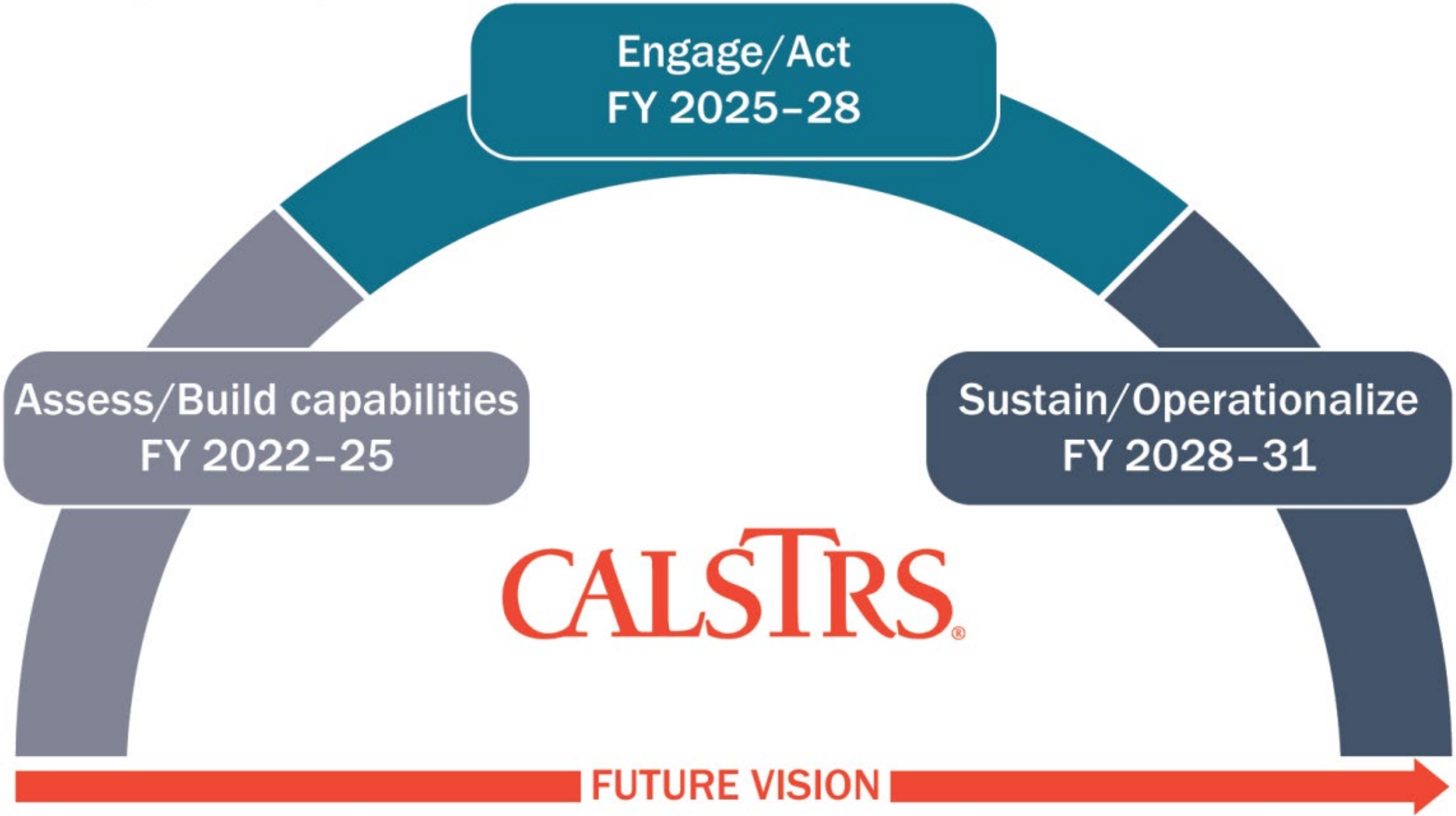
Today's purpose

- Share the OCM program development plan for 2022-25.
- Present key findings and recommendations from assessment.
- Provide a progress update of OCM Strategic Goal 2 and key activities.

Goal 2

Leading innovation and managing change

Innovate to grow resiliency and efficiency in service of our members.


Engage/Act
FY 2025–28
Assess/Build capabilities
FY 2022–25
Sustain/Operationalize
FY 2028–31
CALSTRS
FUTURE VISION

"In recent years, we've undergone extraordinary changes to the way we work and how we interact with others and our members. To respond to these changes, we created a long-term strategic vision. In the first phase of the plan, we assessed our gaps and opportunities as an organization and laid the foundation to build our capabilities."

- Cassandra Lichnock

Chief Executive Officer's Report
Teacher's Retirement Board Meeting, January 10, 2024

Goal 2: Leading innovation and managing change

Innovate to grow resiliency and efficiency in service of our members.

Pursuing this goal will put CalSTRS on the path to realizing our 10-year future vision as follows:

2031 vision of success measures	As demonstrated by
Culture supports strategic vision	• People interactions and coordination. • Responsiveness to change.

PREPARE
2022-23

- Evaluate current state of OCM
- Conduct best practice research
- Map vision for OCM structure

BUILD
2023-24

- Design CalSTRS OCM structure
- Develop OCM program; build team
- Integrate cross-functional partnerships

IMPLEMENT
2024-25

- Train and develop OCM team
- Rollout OCM program enterprise-wide
- Evaluate program impact

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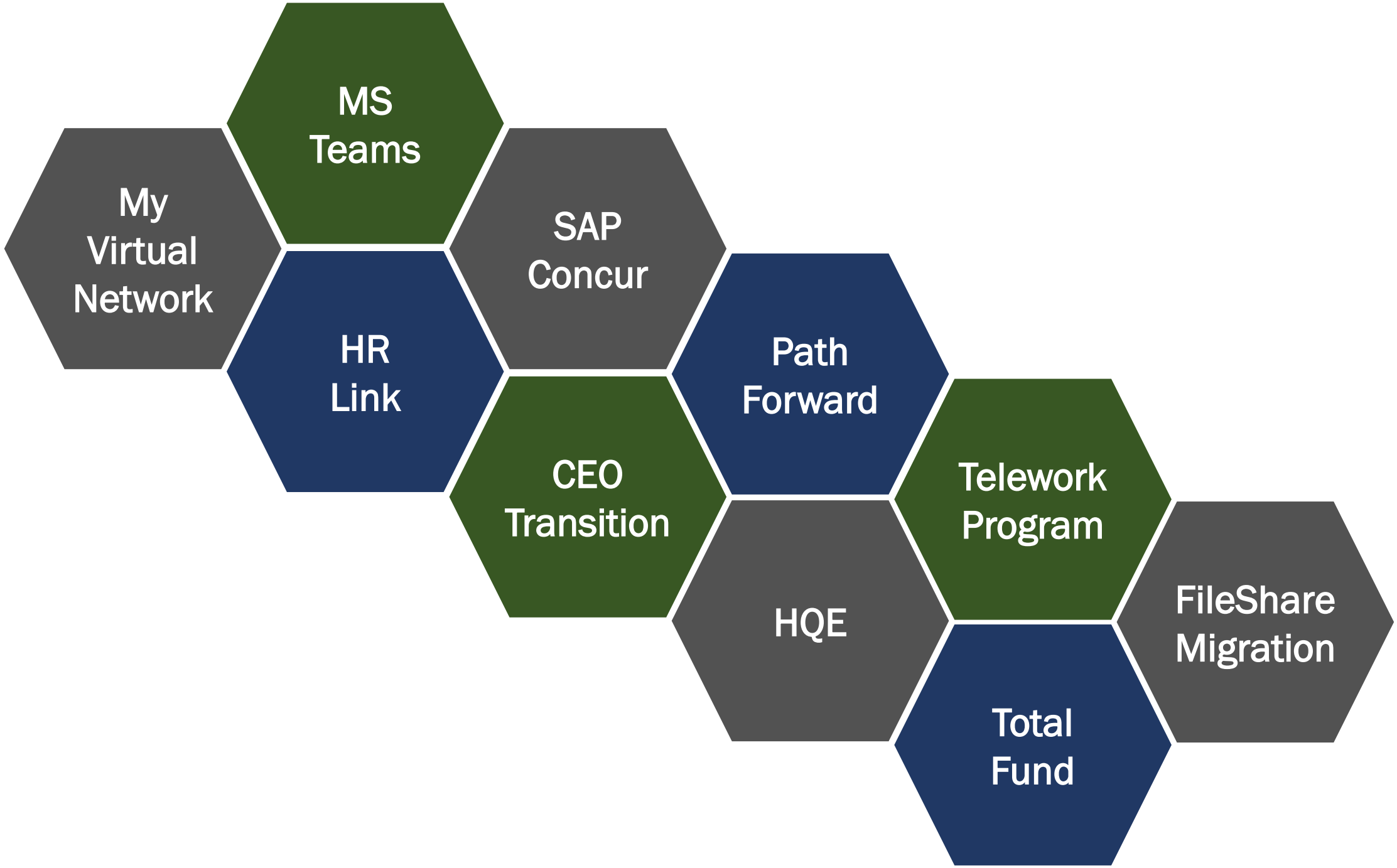
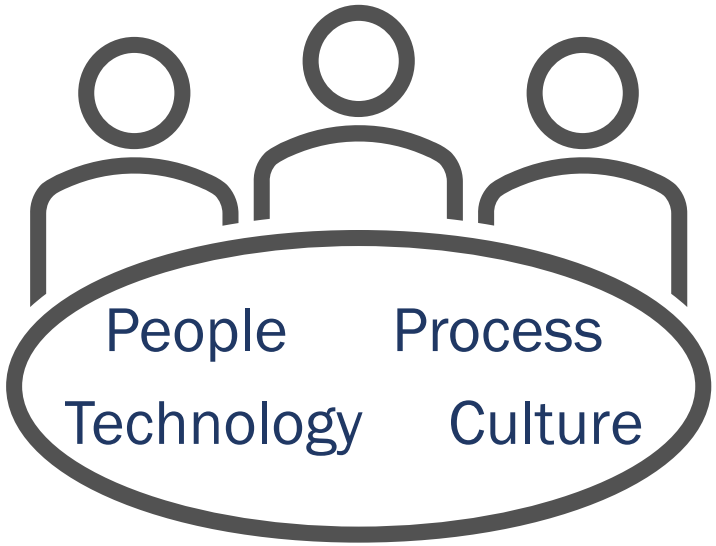

MS Teams
My Virtual Network
SAP Concur
HR Link
Path Forward
CEO Transition
Telework Program
HQE
FileShare Migration
Total Fund

Focus groups



12 focus groups, 71 participants

PARTNERSHIPS:

- Project Management Office
- Communications Division
- Training Services
- Enterprise Strategy Management

PROJECTS:

- Pension Solution
- Headquarters Expansion
- MS Teams, SAP Concur
- HR Link

ENTERPRISE-WIDE:

- Path Forward – Return to Office
- Leadership Development
- Member Service Centers
- Open invitation to all staff

Change management is seen as....	Change management is applied when...	Change management is practiced by...

OCM Focus Groups | Maturity Model Evaluation

adapted from ProSci

QUESTION #1	Level 1 Ad hoc or absent	Level 2 Isolated projects	Level 3 Multiple projects	Level 4 Organizational Standards	Level 5 Organizational Competency
Change management is seen as....	A distraction from the focus of a project.	Important by some, unimportant by others.	A structured approach that adds value.	An important success factor on all projects through a common and standard approach.	Essential on all projects and initiatives as a critical core competency for the organization

QUESTION #2	Level 1 Ad hoc or absent	Level 2 Isolated projects	Level 3 Multiple projects	Level 4 Organizational Standards	Level 5 Organizational Competency
Change management is applied when...	Not at all, or as a last resort and as a reaction.	On few projects, from initiation; on some projects, in reaction; on most projects not at all.	Localized in certain parts of the organization; at initiation on some projects; still missing or as a reaction on many.	Regularly at project initiation or planning; integrated into project management approach.	At the start of projects and initiatives and inseparable from project deliverables or change initiative outcomes.

QUESTION #3	Level 1 Ad hoc or absent	Level 2 Isolated projects	Level 3 Multiple projects	Level 4 Organizational Standards	Level 5 Organizational Competency
Change management is practiced by...	Dependent on particular individual practitioners; not at all by managers and leaders.	Handful of unaffiliated practitioners.	Practitioners who are starting to work together; some senior leaders, mid-level managers and supervisors.	Most practitioners and project teams; most senior leaders, managers and supervisors. Potentially a centralized functional group.	Practitioners, project teams, technical professionals; all senior leaders, managers and supervisors; centralized functional group.

Focus group key findings

Envisioning

“The CalSTRS way of responding to change”

human ● centered ● design

As demonstrated by

- People interactions and coordination.
- Responsiveness to change.

CALSTRS OCM

Organizational Change Management

"Navigating change together, evolving through innovation."

Strategic Approach

Guidance and Structure

Framework and Tools

CalSTRS Partnerships

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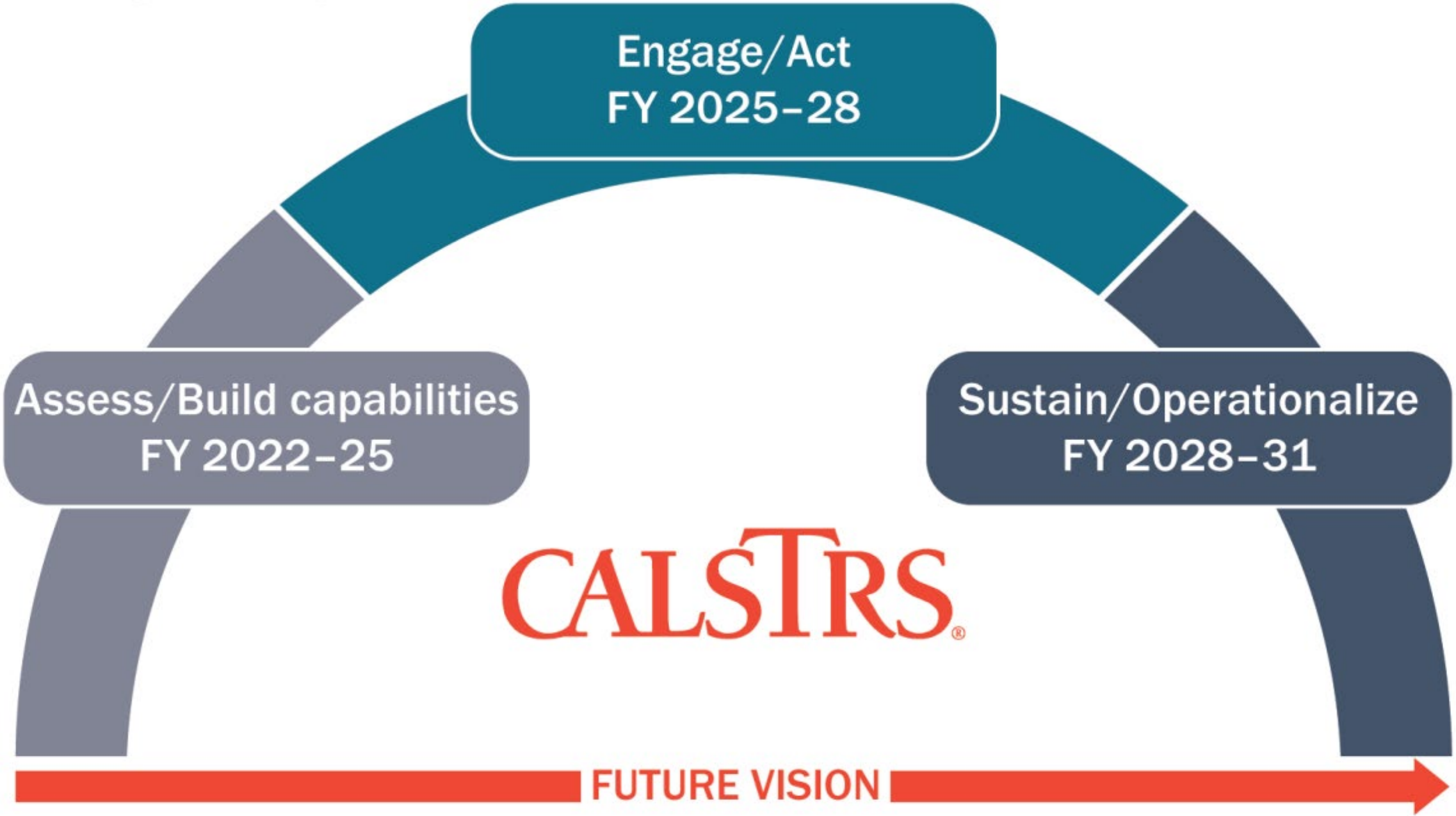
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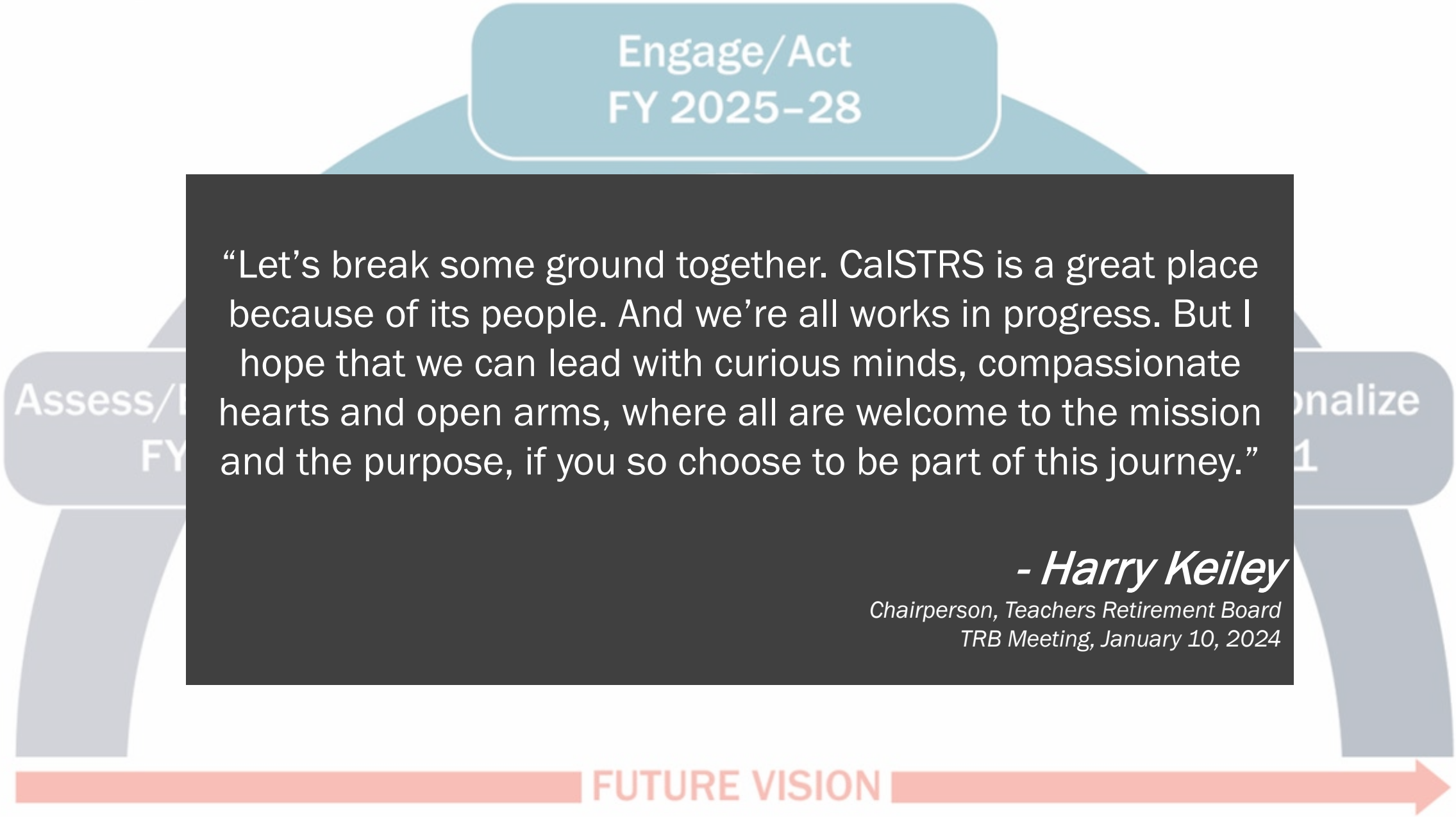

"Let's break some ground together. CalSTRS is a great place because of its people. And we're all works in progress. But I hope that we can lead with curious minds, compassionate hearts and open arms, where all are welcome to the mission and the purpose, if you so choose to be part of this journey."

- Harry Keiley

Chairperson, Teachers Retirement Board
TRB Meeting, January 10, 2024

CALSTRS Organizational Change Management OCM

Questions?