

# Cohort 2019 Outcomes:

## Team 3 CalTogether



**Innovation Priority:**  
Back To The Center –  
Innovation Without Fear In  
A Human-Centric Environment

Team 3: [Presentation Video](#)

Team 3: [Presentation PDF](#)

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# Team 3 - CalTogether

## Abstract

California state government provides necessary services for 39.5 million people. The strength of our incredible state lies with the more than 880,000 state employees who run our government. In order to attract and retain the very best talent, we hope to engage these employees with the mission of their agencies, share career growth resources in a single location, and enable our employees to collaborate seamlessly across the state of California. Our vision is for a web-based and mobile-ready platform that hosts resources related to professional development, personal growth, diverse training pathways, and mentoring and coaching connections. We can provide a centralized hub where the states' resources can be accessed. In this whitepaper we provide a summary of the 5 months of work CalTogether shared: where we started, where we ventured, and our recommended paths forward.

## Introduction

### Innovation Priority

Our employee's ability to deliver collaborative, innovative, holistically effective processes and services are dependent on having a flexible and trusting environment that allows us to be experimental and innovative without the fear of failure or repercussion. We must engage, inspire, motivate, and empower our constituents. We must come back to the center in a human-centric approach and ensure our efforts focus on our constituents' needs—not just the processes and procedures to deliver the services needed. How do we change practices that impede our workforce from being agile and adopting human-centered, end-user design in our daily work? How can we eliminate restrictive practices that impose an expectation of perfection and finality that exclude the end-user of the process or service? How can we continuously focus on end-user needs and end results/goals throughout the process? How can employee engagement demonstrate what inclusive, progressive government can achieve? How can we construct bridges for inclusive environments for our constituents and employees?

### Problem Statement

Cultures that stifle employee engagement create negative impacts on the people of California.

### Moonshot

Create a culture to engage state employees for the people of California.

“In order to attract and retain the very best talent, we hope to engage these employees with the mission of their agencies, share career growth resources in a single location, and enable our employees to collaborate seamlessly across the state of California.”

### Our Call to Action

Employee disengagement, on average, affects 2 out of 3 people nationwide across all industries. Recent CalHR survey data suggests this holds true for California state employees as well. This lack of engagement creates serious problems for the entire workforce, often resulting in frustration, under-production, and unresponsiveness. Team CalTogether has built on Cohort 2018's work to build a dashboard for employees to engage with the programs, people, and population they serve. By providing California State Employees an all inclusive resource (in mobile-ready website and phone application form) to get information on diverse training pathways, personal growth resources, career development tools, and mentorship/coaching connections, the state can attract and retain employees who connect with their mission and will be empowered to take control of their own success.

## Background

Our project builds upon the framework we received from California Innovation Playbook for Government Change Agents (Cal-IPGCA)'s 2018 Cohort Team 3: Produce Empowering Environments for People Statewide (PEEPS). To better understand our project, we encourage interested parties to read the previous white paper “[CHANGE: Download Employee Engagement to Upload Government 2.0.](#)”<sup>1</sup>

The 2018 whitepaper begins with three key areas: urgency, opportunity, and incentive. As part of the incentive to improve employee engagement, the team suggested that “a progressive government is built on three pillars: Engaged Employees, Innovative Workforce, and

Well-Served Constituents” (PEEPS, 3). The 2019 cohort took two of those pillars, Engaged Employees and an Innovative Workforce, and focused on creating a central location to access the resources available to state employees PEEPS identified in their research (see Table 1).

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Resources <sup>2</sup>	
Engaged Employees	Innovative Workforce
Employee Engagement Program	GovOps, CalHR
Cal-IPGCA Association	Cal-IPGCA
NxtGov	HiAP/GARE
Mentoring Program	Supervisory Academy
Career Development	Lean 6 Sigma
State Employee Association	Master Analyst Training

The ultimate product created by the 2018 cohort was an employee dashboard. This concept would be web-based and rely primarily on CalHR resources. The inspiration for the previous project was the 2015 CalHR and GovOps engagement survey<sup>3</sup> that illustrated how much of our state workforce is currently disengaged. After establishing the need and developing a plan for this project, one of the primary limitations the previous team encountered was a host for the platform. While we did not secure a final host for this platform, we decided to proceed by clarifying goals for the dashboard and searching for alternative hosts for the project.

Throughout this project process, we thoroughly discussed what it means to be an engaged employee at the state level. We agreed on a definition of an engaged employee as someone who pays attention to the people and processes around them, who proudly identifies as a public servant, who wants to contribute to the success of their organization, and/or who is willing to work with others to question a process or improve a procedure. Engaged civil servants know the mission and vision of their agency and can connect with it. This definition allowed the team to visualize the ideal engagement characteristics that we hope to magnify with centralized employee resources.

## Process

This project was developed over five months as part of the 2019 Cal-IPGCA program. Our team met for six full-day training sessions, two champion meetings, and a hackathon. Outside the training program, we held weekly

“We agreed on a definition of an engaged employee as someone who pays attention to the people and processes around them, who proudly identifies as a public servant, who wants to contribute to the success of their organization, and/or who is willing to work with others to question a process or improve a procedure. Engaged civil servants know the mission and vision of their agency and can connect with it.”

video conferences, met offsite, and communicated between meetings via Slack.

When our team met in person, we frequently used a brainstorming process Cal-IPGCA refers to as “Rapid Innovation.” Rapid Innovation forces participants to quickly write every idea they have for a given prompt and provides the opportunity to find both consensus of thought and standout ideas (Figure 1).

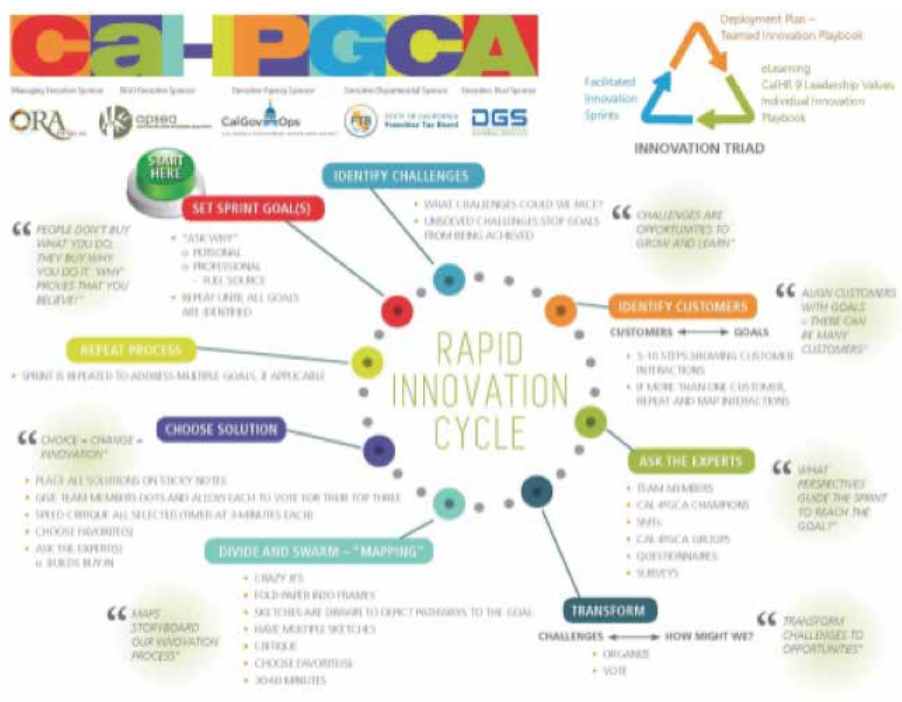


Figure 1: Rapid Innovation Cycle

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At one of our final meetings, Thea Kaiser, an outside design consultant assisted us with the creation of our user personas and the accompanying user flows. This experience helped us focus our vision on the customer experiences that we ultimately hope to create. Additionally, in our final offsite meeting, the team worked with Thea to finalize mockups of our application's appearance and functionality for our target user.

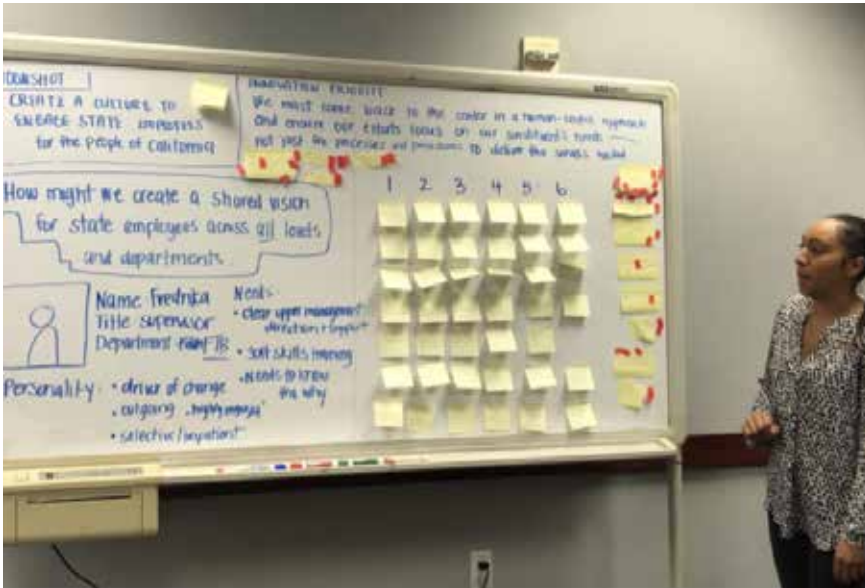


Figure 2: Developing User Flows with Thea

The Hackathon invited state, university, and private software and technology design enthusiasts to meet at the Franchise Tax Board to develop digital solutions for the Cal-IPGCA Cohort 2019 teams. CalTogether had 2 hackers, a software engineer with CalTrans and an employee from the IT department at Franchise Tax Board. They worked with the team in two different ways: to develop the prototype platform and to establish the information that would be available to our users.

The Hackathon allowed the team to get ideas from various people on how to add value through the application. At this event the team worked with coding experts to develop a prototype of the CalTogether platform. Using the base code from the CA.gov website, they were able to quickly assemble the platform. The use of CA.gov programming provides an appearance that is familiar to employees, making it quickly trusted and accepted. We agreed upon a single sign-on feature to use agency login information so people

could quickly and easily gain access to the platform without remembering an additional password. Thea has continued to assist CalTogether with further developing a prototype to visually and operationally convey the platform's functions.

### What Exists

There are many state agencies that have developed innovative programs for recognition, knowledge-sharing, training, and mentorship. However, we would like to diminish the silos that currently hold these innovative models and ask our agencies to contribute their bold ideas for one unified California government. In our project, we will build upon some of the successful programs around the state and work toward a centralized location where we can all grow, share, and develop.

The PEEPS team from Cohort 2018 identified the value of having a single dashboard where information on professional development, training, personal growth, and mentoring resources could be stored. In their white paper, this dashboard was identified as the next step needed for more investigation and development. This starting block was used for the Cohort 2019, CalTogether team.

In the California state government, we have myriad examples of innovative employee engagement strategies: an app-based employee recognition program offered by CalSTRS, a mentorship program at CalTrans, monthly paid time off for professional development at CalOES, Emotional Intelligence (EI) training at CHHS, and more that the present team has yet to discover.

As state employees, we are one California. We receive our checks from SCO and use their website to look up our paydays and holidays. We check our health benefits and years of service on CalPERS.com. We use CalCareers to search for transfers and promotions available to us at agencies across the state.

Yet, if a state worker wants to know what they should expect in the way of training, mentoring, perks, or recognition at their next position at a new agency, they may not know where to look. A dedicated job hunter may use non-state platforms like Glassdoor and LinkedIn to try to reach out to strangers who might help them better understand agency

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cultures. However, to engage employees with the available resources, we need to provide this information readily to help them make informed choices and feel more in control over their future with the State.

Non-state entities like NxtGov and Cal-IPGCA offer incredible training, networking, and professional development opportunities for state workers. Governor Gavin Newsom insisted in an executive order that “the State must foster a culture conducive to innovation, including communicating and collaborating with the private and public sectors at the outset of a project to better clarify the State’s business requirements and social imperatives, and then evaluating working solutions before the State invests significant taxpayer dollars: Californians that emphasizes outcomes through collaborative and iterative learning.”<sup>4</sup>

However, many employees are unaware of the offerings that fulfill Governor Newsom’s vision because the resources are scattered across websites and file cabinets. Some of the most impressive resources remain siloed within agencies. If we want our workforce to stay engaged far into their careers and retain their skills and knowledge, it is essential that we make it easy for them to access a full spectrum of resources. We want California to be the employer of choice. We want rank and file and managerial staff alike be able to find what they need in a single place.

## What People Want

### Survey

In order to build on the framework the 2018 Cohort provided, we built a set of questions to be distributed in a survey across agencies in order to identify the most logical direction forward. These are the questions we used:

1. Overall, how satisfied are you with your organization?
  - a. Very Satisfied
  - b. Satisfied
  - c. Dissatisfied
  - d. Very Dissatisfied
2. Overall, how satisfied are you with your current job?
  - a. Very Satisfied
  - b. Satisfied
  - c. Dissatisfied
  - d. Very Dissatisfied
3. Is your work acknowledged in your organization?
  - a. Yes
  - b. No
4. What is your preferred way to learn or obtain additional information?
  - a. Email
  - b. App
  - c. Website
  - d. Text
  - e. Paper
  - f. Memo
  - g. Presentation
5. Would you like having a single-portal source of additional helpful information for your state employment?
  - a. Yes
  - b. No
6. Would you access this information outside of work hours?
  - a. Yes
  - b. No
7. Many organizations have provided self-assessments for employees such as Myers-Briggs, StrengthsFinder, DiSC, etc. Would having access to these be of interest to you?
  - a. Yes
  - b. No
8. Which of the following information would you use? (Check all that apply)
  - a. Professional Development
  - b. Training
  - c. Networking
  - d. Emotional Development
  - e. Career Maps
  - f. Coaching
  - g. Personal Development
  - h. Mentoring
  - i. Best Practices
  - j. Leadership Development
  - k. Career Development

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This survey was hosted and distributed by Cal-IPGCA in partnership with nFocus. Our survey distribution began on October 1st and closed on October 31st rather than October 10th as originally projected. Many of the state agencies that Cal-IPGCA leaders reached declined or were unable to distribute the survey, so the responses were limited. Reasons for not distributing the survey varied, including conflict with existing employee engagement surveys. The data was below statistical significance for the state employee population, so we have not included it in our analysis for the product.

The protective and siloed response to this survey distribution is a prime example of the risk-focused, guarded cultures that our project hopes to combat. A vision of one state workforce is essential to the success of our program, and the refusal to distribute our survey leaves us without data we hoped to use to finetune. CalTogether as an application, but with further anecdotal evidence of silo mentality. Still, this is a preview of challenges ahead when we ask departments to adopt our product.

### Rapid Innovations

The CalTogether team used rapid innovations during the monthly classes, however, the majority of the information used to develop the platform's features was gathered during the Ask The Experts summits on August 5th and September 8th, 2019. We asked our champions, subject matter experts, and cohort peers the following questions:

1. What goals do you see for this Innovation Priority?
2. What do you see as the biggest/highest priority action within this Innovation Priority?
3. What challenges do you see for this Innovation Priority in achieving those goals?
4. What Data Analytics would you like to see come from the final product of this Innovation Priority?

Rapid innovation produces a plethora of data quickly by asking participants to write as many responses to each question as they can in a short time frame on small pieces of colorful paper. After the designated time, the paper is collected and responses are displayed on sticky sheets of fabric and photographed/documentated (see Figure 2). This process can be used in large or small groups to generate ideas and identify commonalities as well as reveal which solutions are truly novel.

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Figure 3: Rapid Innovation Results

After each event, our team reviewed the responses, typed them, and identified themes. After creating summaries and pulling out key ideas, we organized the data into a spreadsheet (see Figure 3). The data collected in this way was fed into cohort-wide charts to be shared on the Day of Innovation. This process repeatedly demonstrated a few important ideas that innovators shared.

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- **Goals**
  - Prototype the application
  - Have the people be the focus of the application
  - Become a shared location for all departments/agencies so we can then in the future expand this app or duplicate it for the people of CA
  - Connect personal goals and professional goals
  - Give people have a means of defining/determining their purpose within their work
- **Highest Priority Action**
  - Define the User
  - Support from management
  - The ease/use of the app, how it looks, what it contains
  - Participation/buy-in at all levels
- **Challenges**
  - Concern about the host
  - Buy-in (from users, agencies, and IT)
  - Time to develop, promote, distribute, and train
  - Guarded silos that won't allow experts to shine outside their agencies
  - Human-centered products have human-centered problems (toxicity, competition, politics)
  - Requires a cultural shift from the stereotypical government worker who does their job, gets their benefits, and goes home
- **Data**
  - Need to determine what people want, and what adds value
  - Develop means of tracking clicks and most used modules

Responses to Question #1: What goals do you see for this IP?	
Inspire new ideas and willingness to share openly and without fear or judgement	Collaboration
Make collaboration and innovation a part and parcel of every state job	Collaboration
Break down faceless workforce mentality	Collaboration
Learn how to create the culture and buy in from all depts and trust the employees	Collaboration
Support from governors office and agency and dept directors to allow employees to share their ideas in solving state wide problems	Collaboration
Have ability to create focus groups on issues by reaching out to employees who have the knowledge, skills and abilities	Collaboration
Provide a frame work to move ideas from concepts to pilots to decisions upon implementation	Collaboration
Top down and bottom up support	Collaboration
Better sharing of proven innovation in the state	Collaboration
Greater freedom for employees to adopt, adapt and improve on others innovations to fit their organizations	Collaboration
Encourage innovation and keep staff engaged and excited	Collaboration
Create and engage in inclusive environment and make it easy for people to find resources and connect with others.	Collaboration
Create shared definition and understanding of engagement	Collaboration
Obtain inter agency agreements and share across platforms	Cross Agency
Goals have to cover or deal with a wide range of subjects and areas like HR, modern cultural norms, social science and privacy	Cross Agency
Support from Cal HR and DOF	Cross Agency
Find new ways to engage all employees	Employee
Invest in employees	Employee
Get employees who are passionate about the mission	Employee
Get employees who are happy at work and are happy to serve the end customer	Employee
What is an employees role in the own level of engagement	Employee
Make the app a resource for all employees and all levels	Employee
An app that is user friendly and relevant to share with employees	Employee
Make employees and constituents feel seen, heard, and not just numbers or cogs in a wheel	Employee
Get employees in jobs they are passionate about	Employee
Create positive reputations for state workers	Employee
Obtain funding and housing for app for maintenance	Financial
Define the place, person, or company that will house and maintain the app	Financial
Hiring the proper staff to build the app	Financial
Keep your app outside of government for maximum flexibility	Financial
Leaders will have and demonstrate the qualities of daring leaders	Leadership

Figure 4: Rapid Innovation Data Organized in a Spreadsheet

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### Champion Interviews

In an interview with PEEPS member Shkiba Samimi-Amri (CDHCS), we gained some critical insight. Shkiba recommended a system of agency liaisons and CalTogether ambassadors who volunteer to socialize the application in their workplace. These key players could easily be sourced by harnessing the existing community and network of passionate civil servants found in NxtGov and Cal-IPGCA Association. Through NxtGov we could give professional development talks and webinars to teach state employees about the application and guarantee a more successful adoption and use throughout the state.

Tonia Burgess, NxtGov Professional Development Executive and former Cal-IPGCA cohort-member offered some excellent insight as a twenty-year state employee well aware of the challenges our cross-departmental project might face. As a member of both NxtGov and Cal-IPGCA Association, she stressed the power that either or both of the groups might have as hosts for the app, and how clearly aligned our project is with both organizations' values. Tonia also emphasized the importance of allowing employees to access this information from anywhere (not just at their work computers where their supervisor may disapprove of their search for positions outside the agency), and allow for access outside of work hours.

In our discussion with Kathie Kishaba, the Deputy Director of the Department of Water (DWR) Resources Business Operations, the main take-away was ensuring that there was buy-in, and that departments would be able to align the application features and resources with the suggested activities for their employees. Kathie was very supportive of a resource for all employees to get more information on how they can develop personally and professionally, and mentioned that the resources that were included for the app aligned well with what she found in the results from the DWR employee engagement survey.

Greg Duncan, an IT specialist with the Department of Rehabilitation (DOR) had some very important considerations for our application. First and foremost, he stressed the importance of the app being accessible. Universal access should be at the forefront of our design. Additionally, he recommended that we develop a website, which is mobile-ready and allows for the information maintained on the site to feed into the application. This will allow for the information on the website to be maintainable by

“Determining why people stay, and not only why they leave, would be powerful data to collect from current state employees.”

current state employees and still support the flexibility of an application.

Karla Nemeth, Director of DWR, offered her advice on how to engage people in an organization that already has a good level of engagement. She emphasized the importance of listening to the people that work with you, and ensuring that our processes are efficient and effective. She mentioned there are a lot of work-arounds for difficult processes, and while that may be effective for the short term, it means we continue to function in a way that no longer serves the organization. Our team took away the importance of listening to users, and how critical it is to serve and consider their needs when we develop the app's functionality.

James Waterman, Senior Director of Strategic Relations at Singularity University, provided guidance to our team on how to approach the application in a way that would add value every day for its users. He emphasized a user-friendly design that would drive users back to the app regularly to find more information. He recommended that we gamify the application, perhaps with a badge feature to reward certain accomplishments. He also suggested creating feedback loops which allow the application to learn and inform itself based on the users' actions. This is an automated way to improve functionality. Users will also appreciate transparent communication about how the app is changing based on the feedback received from its users.

Erin Carvel from Employee Development Services at the Franchise Tax Board indicated that career mapping and planning for careers is important to people. Having a clearer and simplified job classification system is key to engaging employees. Allowing for these career maps to also be informed by the users personal profile can allow for the information to pull in self assessment results and suggestions. She also provided information on the California Network of Learning Professionals (CNLP) which can be provided as a resources through our application.

Additionally, determining why people stay, and not only why they leave, would be powerful data to collect from current state employees.



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## What Could Be

As a team, we created a unified vision for the dashboard that the 2018 Cohort team described. This web-based and mobile-ready platform will incorporate features based on our champion interviews, rapid innovation results, and hackathon partnerships.

### Design

When accessing the platform, users will be prompted to create an account and fill out a profile. LinkedIn integration will speed up the account creation process. The user will not be required to input an inordinate amount of information or detail into their profile, but will be expected to provide basic information like their name, working title and department, and will be encouraged to provide sufficient detail to maximize the benefits of the program. A more basic profile will get a user started, but certain features will require a more detailed description of their experience and goals. Additionally, a user preferences survey will be developed to determine their areas of interest, learning preferences, and personality traits in order to customize the suggestion feature for different trainings, assessments, and articles. When users open the app or visit the web-based dashboard, they will find these primary modules to explore:

1. Plan (Calendar)
2. Develop (Career Development Tools)
3. Train (Diverse Training Pathways)
4. Grow (Personal Growth Resources)
5. Connect (Mentoring & Coaching Opportunities)

In addition, a sidebar will feature extra areas to peruse: a feedback portal, classification pathways, a list of all CA state agencies with links to their careers pages, and a section we playfully named “I bet you didn’t know . . .” which consists of a user-contributed lesser-known agency perks.

### CalTogether Profiles

- Ability to auto-fill from personal LinkedIn profiles
- Skillset database including soft skills and abilities verified through training, education, and experience
- Headshots
- Agency, classification, working title, current location, years of state service, years in industry, education, registrations/licenses, hobbies, professional goals, self assessment results

“Providing centralized resources for people to grow in their career builds allegiance and will allow for people to better reap the long term benefits that state employment offers.”

- Badges for training attendance/skills
- Desired areas of growth

### Plan (Calendar)

A calendar will display upcoming events offered by state agencies and the non-state entities that cater to civil servants in the user’s area. During account creation, a geographic region is selected and the calendar provides only events going on in the user’s area.<sup>5</sup> Contributors to this calendar will include Cal-IPGCA Association, NxtGov, CalHR, SEIU 1000, PEGC, as well as champions from each agency and regions throughout the state (recruited during the dashboard socialization period). Users will be able to control the events that show up on myCalendar through category or key-word filters. For example, if a user would like to know about all upcoming events featuring job recruitment, specific to accounting careers, they can filter their results to show pertinent events in the geographical region they choose.

### Develop (Career Development Tools)

The Develop section will open doors for employees to discover career development tools, including information on job opportunities and classification career-mapping. Currently the pathways an employee can take to grow through state government is not widely available, and this would provide a resource for people to see a customized growth path within government, and ultimately help retain talent. Providing centralized resources for people to grow in their career builds allegiance and will allow for people to better reap the long term benefits that state employment offers.

#### • Job Opportunities

- Link to CalCareers
  - Provide instructions for strategic searches (by classification, skill, working title, or county)
- Talent Assessment
  - Users complete an assessment (via O\*Net)<sup>6</sup>
  - Careers are suggested based on interests and self-identified skills

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- **Classification Career Mapping**

- Select classification then explore the potential pathways that the classification can offer
- Each classification in the chain can be clickable and link to the CalHR Classification Specification (which details the nature of the work and outlines minimum qualifications)

- **Professional Networks**

- A bank of searchable (tagged) descriptions of professional networks and associations available for state employees
  - Cal-IPGCA Association
  - NxtGov
  - ToastMasters
  - Innovative Pathways to Public Service
  - New Leaders Council
  - Industry-specific resources (dropdown menu of fields such as engineering, human resources, environmental science, auditing, contact center, data analytics, etc.)

- **Link back to calendar and events tagged “Grow”**

## **Train (Diverse Training Pathways)**

Similar to other modules, Train will feed off information provided by the results of the user’s profile survey. While all state employees have access to CalHR’s training calendar as well as their own agency’s offerings, finding a good match for their particular needs or interests can be cumbersome and often frustrating. This area of CalTogether will aggregate events in one location not only to support their job functions, but also for upward mobility and expanding the user’s career horizons.

- **Calendar of events (all events tagged “Train”)**
- **Detailed descriptions for each training**
  - Location
  - Style (in-person, webinar, computer-based training)

- **Training sources**

- CalHR
- Agency-specific
  - Updated by each agency’s CalTogether liaison
  - Searchable by “department-only” or “open to other state employees”
- CalTogether Partners
  - Cal-IPGCA
  - NxtGov
- Community-contributed events (mediated by ambassadors and agency liaisons)

- **Link back to calendar and events tagged “Train”**

## **Grow (Personal Growth Resources)**

Unlike the previous areas of CalTogether that focus on an employee’s professional path, these assessments and opportunities for growth recognize the whole person, not just their productivity. Mindfulness and social intelligence training is gaining momentum across the state and the private sector has long recognized its place in employee engagement. The following resources will be shared by the agency liaisons and CalTogether ambassadors.

- **Recommended reading**
- **Guided meditations**
- **Self-care and work/life balance articles**
- **Links to various personality assessments**
  - MBTI
  - Big Five
  - Enneagram
  - DiSC
  - Clifton StrengthsFinder
  - True Colors
- **Link back to calendar and events tagged “Grow”**

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## Connect (CalTogether Connections)

One of the most desirable features requested by our survey-takers, champions, and stakeholders has been a mentoring program. In a discussion with one of our champions, we explored the problematic nature of the term “mentoring” and decided to remove it from the name of this module. In order to avoid the linguistic implication of a hierarchy between participants, we are creating connections instead of mentoring relationships to promote a two-way partnership of learning, development, and growth.

- Uses all information on profile to match users with potential connections
- Brief Connections Survey
  - What are you looking for in your Connections experience? (check all that apply)
    - coaching
    - career path guidance
    - skills development
    - networking
    - brainstorming
  - What skills are you hoping to develop?
 

• work/life balance	• writing
• self awareness	• creativity
• listening	• managing up
• giving feedback	• time management
• personal why	• budgeting
• innovation	• leadership
- Scheduling coordination function
  - Availability (calendar sync)
  - Frequency of meetings (monthly, biweekly, weekly)
  - Location (excludes matches beyond a certain distance)
- Link back to calendar and events tagged “Connect”

“One of the most desirable features requested by our survey-takers, champions, and stakeholders has been a mentoring program. In a discussion with one of our champions, we explored the problematic nature of the term ‘mentoring’ and decided to remove it from the name of this module. In order to avoid the linguistic implication of a hierarchy between participants, we are creating connections instead of mentoring relationships to promote a two-way partnership of learning, development, and growth.”

## UX and Future Directions

### User Personas

The group brainstormed with Thea Kaiser to develop three user personas. This process helped us understand who are users are and how extremely different their needs might be. In this same session we developed a potential user flow that our first persona, Fredericka, might experience.

**Frederika** is a driver for change. She works hard and cares about her department moving forward. She’s outgoing and highly motivated, however, she can be selective and sometimes impatient.

**Sam** is disengaged and frustrated by the pace of government because they<sup>7</sup> came from the private sector, and might go back. They are highly tech savvy, and are always looking for digital solutions to paper problems. Sam can often be heard saying “that’s not on my duty statement” to their coworkers and superiors.

**Colin** has been with his agency for 10 years. He does a good job, but is not inspired by his role. His coworkers often call him stubborn. He gives simple PowerPoint presentations to his business area about the progress his team has made, but when he’s asked to do an analytical task, he often needs assistance with basic functions in Excel.

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## User Flows

The user flows shown below were created by Thea Kaiser, of Kaiser Designs. She incorporated our ideas with her expertise in creating a user interface that will feel familiar, and quickly trusted by California state employees with the CA.gov standard appearance. This user flow is a “click through” of what can be expected from our application interface.

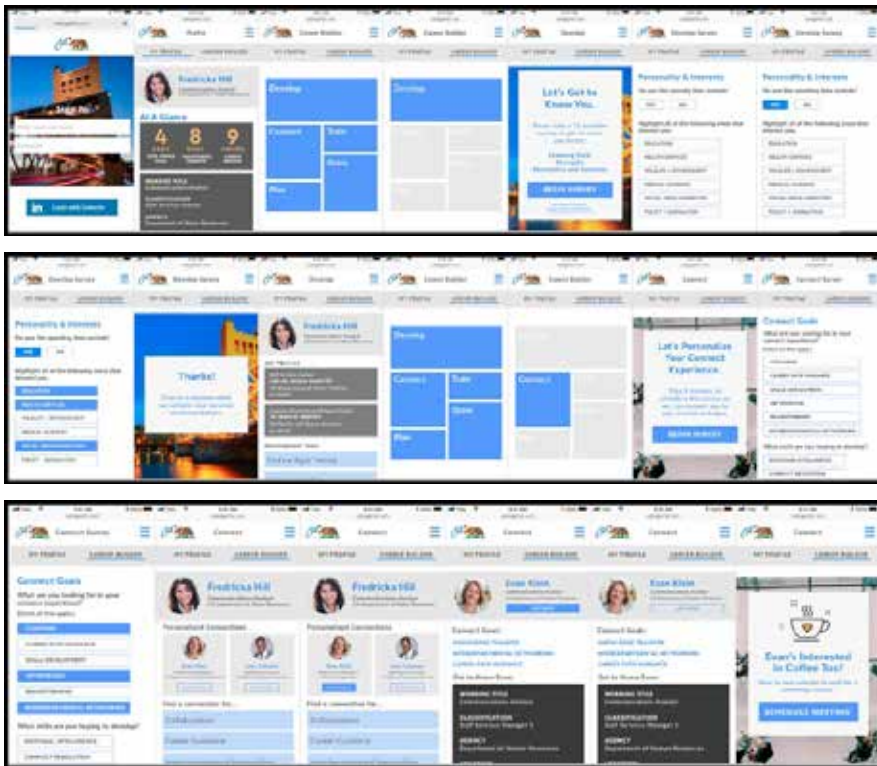


Figure 5: User Flows for Fredericka

“For our most immediate needs, the CalTogether team believes that the Cal-IPGCA Association has the passion, power, and potential to assist with the start-up. They hold the unique position of having an intimate knowledge of the project’s scope and an investment in the product effectively moving forward.”

## Challenges and Future Directions

As with any innovation that strives to make a positive cultural change, implementing the CalTogether dashboard is not without its challenges. The CalTogether team reviewed the PEEPS white paper findings, listened to Cohort 2019 champions, and crowdsourced potential obstacles from other cohort members and champions. We identified four main areas where the CalTogether platform could face challenges: start-up & resources, roll-out & implementation, content management, and buy-in by key interest groups.

### Start-Up/Resources

As with any undertaking in tech, funding for start-up and identifying a host are major concerns. The CalTogether team believes we have identified potential groups to take on the challenge of creating this human-centric application. Organizations such as NxtGov, the California Health and Human Services (CHHS) Office of Innovation, and the potential for a public/private partnership could help lead the way for this innovation priority. For our most immediate needs, the CalTogether team believes that the Cal-IPGCA Association has the passion, power, and potential to assist with the start-up. They hold the unique position of having an intimate knowledge of the project’s scope and an investment in the product effectively moving forward. Members of the Cal-IPGCA Association are aware of the need

for inclusive, accessible, human-centered design and the employee empowerment our product promises. With its agency and industry connections, collaborating with another group would be in perfect alignment with the group’s mission and goals.

### Roll-Out/Implementation

We anticipate that getting users to the portal and keeping them engaged will be a challenge. Our implementation plan includes workshops, webinars, and hands-on demonstrations to potential users as part of the beta testing for the application. This will hopefully lead to quicker buy-in from the state agencies and employees we hope to serve. Staff resources to maintain the information and functionality of the application are essential, as learning algorithms can

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have limitations. The team has extensively discussed the need for agency liaisons, application ambassadors, and various information campaigns targeted to the audience and presented by an internal spokesperson. From the rapid innovation we completed thus far, it was clear that rank and file employees will likely view this resource differently than supervisory users, and these considerations need to be incorporated during the campaign.

We also need a way to distinguish this application from existing portals and resources. In essence, the CalTogether app strives to be a vital resource to State employees, but if it cannot prove its value beyond the current CalCareers, CalHR, internal agency, and State of California resources, its true potential will not be realized. The messaging must be clear and must communicate why a centralized hub can engage employees in their lives and careers (value for the individual), increase employee retention (value for agencies), and keep quality employees in civil service (value for the State of California). The CalTogether team believes that through organizations like NxtGov and Cal-IPGCA as well as through agency liaisons and ambassadors, we can communicate the value added at every level.

We have developed a set of strategies to socialize our app and create long-term users. Through partnerships with Human Resources departments across the state, we hope to add the CalTogether app to employee orientation/onboarding schedules. This effort has the potential to create early habits among new-to-state employees, making our tool the first place they look for resources. HR professionals will also be key for the adoption of the app among established state workers. Career Development programs, Individualized Development Plans, and performance management programs could all benefit from referring employees to our app.

To ensure that all employees can access our resources, regardless of tech-savvy, tutorials will be shared on social media and in email blasts. A troubleshooting landing page will provide step-by-step guides for each module in the application. Educating users on the features of the app is vital so they can make the most out of the content accessible to them. Once the app has been rolled out and users begin to access it with greater frequency, maintaining ease of use and relevant content poses other challenges.

### Content Management

Maintaining fresh and current content is the most important consideration once start-up and roll-out are completed. The

application needs to serve the people that access it to remain relevant and useful. Collecting data on the areas of the application people regularly visit can ensure energy is focused on updating and developing the modules people use the most.

Furthermore, direct user feedback through surveys and comment features will provide guidance on how to improve the product in future iterations.

Intuitive navigation through the application should be a central focus for developers. This means that we may have links to the same resource through different paths to serve different topic associations users may have. The human-centric design will create a personalization that will continuously feed information to the user that truly appeals to who they are and what is at their “center” rather than inundating them with information that may not appeal to them.

While creating their profile, the user will be able to provide as much or as little information as they desire about career, training, and other interests that will tailor their user experience to suit their needs. This individualistic approach will not only attract users, but keep them coming back.

Cyber security has been a concern throughout the development of the CalTogether concept. The 2018 cohort acknowledged this as a focus and our interactions with Cohort 2019 Champions and the hackers reinforced this concept. Utilizing the security resources the state already houses, however, will make it possible to offer customized value in a way that remains confidential and secure. Future work on the app should take care to consider the users’ concern with security and ensure we are able to provide it.

### Buy-In

Buy-in for our application will begin with alpha testers (our first users). We expect these users will be members of NxtGov and the Cal-IPGCA Association. When the application is formally released, these alpha-testers will be encouraged to share the application with their LinkedIn connections and other social media networks. These users will be established as ambassadors at their agencies, where they will spread the word about the application’s capabilities.

Organizational ambassadors and sponsors will also promote via social and email campaigns. A small number of users at each agency (preferably in a position that directly connects to the promotion and adoption of CalTogether such as

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Human Resources, IT, or Communications) will be designated the CalTogether Liaison for that agency. Targeted campaigns will be shared through these liaisons for each business area (HR, IT, and Communications) so these key groups can assist with the socialization of the product.

While the heart of the CalTogether app is the user, we acknowledge that state employees' careers are an intricate web of individual desires channeled into agency goals, personnel rules and protocols, and bargaining unit MOUs. Engagement with these groups (agencies, regulatory bodies, and unions) will be important so that they understand that the CalTogether app is ultimately designed to retain our most valued employees. Movement between agencies is already commonplace, but understanding the singular vision for a stronger, better California is part of the cultural shift our application supports. Agencies are not served by keeping employees who are not engaged in their missions, so making this value added by the CalTogether application clear will increase agency support of our efforts to help state workers find the best possible fit in California government.

### Acknowledgments

The previous team from Cal-IPGCA's 2018 Cohort Team 3: Produce Empowering Environments for People Statewide (PEEPS) laid the foundation for our project and provided a great deal of the preliminary research we used for our project. Those members were: Shkiba Amri (CalOES), Aman Thiara (CalOES), Elizabeth Steffensen (DOR), Leslie Taylor (CSD), and Ajay Goyal (DWR).

This year's team included Gene Romagna (DMV), Bill Fallai (EDD), Paul Kaiser (FTB), Courtney King (CalSTRS), Jodi Lopez (CalOES), Morgan O'Brien (DWR), David Rizzardo (DWR), and Kamie Sharma (FTB). We were assisted by our facilitators, Mimi Fitzsimon (FTB) and Aman Thiara (CalOES).



Figure 3: CalTogether Group Photo

### Our champions:

Karla Nemeth (DWR) Kathie Kishaba (DWR)  
Shkiba Samimi-Amri (CDHCS) Tonia Burgess (DGS)  
Tamara Srzentic (CHHS) Felicia Borges (CalHR) Erin Carvel (FTB)  
Greg Duncan (DOR)  
James Waterman (Singularity University)

### Our hackers:

Sim Litt (CalTrans)  
Thea Kaiser (Kaiser Designs) Janean Pritchard (FTB)

### References

1. PEEPS Whitepaper (2018)
2. Adapted from PEEPS (2018). The previous team looked at both state workers and their constituents, exploring resources for both employees and the public. The 2019 team chose to focus exclusively on the engagement of employees, therefore we have excluded the resources for the public from our study.
3. CalHR survey results
4. Executive Order N-04-19
5. State employees further from the capitol (particularly those in far northern remote areas) can get frustrated when inundated with opportunities offered to Sacramentans and not to employees in their region. It will be important to find champions to assist with the calendar feature in locations further from Sacramento.
6. O\*Net is a job placement tool offered by the U.S. Department of Labor that offers a list of occupations that fit your preferences after a brief assessment.
7. Using the singular non-binary "they" in a user persona is the bare minimum a developer can do to be inclusive of our workforce. We hope to involve the experiences and needs of our broad spectrum of California state employees in all of our alpha testing and pilot programs.