

Office of
Human Capital
Management



Bonneville Power Administration
Risk Informed
Human Capital - Workforce Plan
2007-2009

Note: Staff version which still requires senior executive review

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2007 BPA Risk Informed Human Capital - Workforce Plan

Introduction

This 2007-2009 Workforce Plan is a first update to the Plan issued in February 2006. Its purpose is to provide focus and direction to Human Resources (HR) strategy to enable BPA to have the right number of people with the right competencies in the right positions at the right time to successfully achieve BPA's business objectives today and in the future.

The goal is to update this plan on an annual basis. The 2006 plan involved creating a workforce planning process, engaging agency management support and change management. This plan incorporates lessons learned so far. The next plan will include an agency-level repeatable workforce planning process aligned with the new organization structure.

The plan will now serve as the BPA Human Capital Plan, in support of the President's Management Agenda and the Human Capital Management Initiative. Workforce planning is an iterative process; however, this plan will focus on critical staffing needs through 2008 and provide specific guidance to the HR functions.

Driven by BPA's business strategy and Balanced Scorecard, the Human Capital Workforce Plan (WP) is developed by HR in collaboration with leadership across the agency. It uses the agency-adopted Australia-New Zealand Risk model to assure that critical needs are identified, assessed, and prioritized and that resources are allocated appropriately.

Note that every effort has been made to use common Human Resource terms for workforce planning. However, the term "succession planning" is applied at BPA to both Leadership/management positions and to other mission critical skill expert positions for which ready replacements are needed before the incumbent leaves his/her position.

The plan concludes with:

- Agency-level strategic HR risk treatment initiatives with plans
- Occupation or position-specific risk treatment plans which generally draw on the agency-level HR initiatives.

Given the changing external landscape and dynamic internal environment under which these plans have been created, some treatments will require adjustments as we proceed.

The 2006 WP recognized BPA's vulnerability stemming from:

1. increasing retirements in mission critical areas,
2. changing business strategy, policy, regulations, processes, and technology,
3. changing workforce demographics, and
4. the increasing complexity of the utility business environment.

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In its most recent assessment, the Enterprise Risk Management Committee (ERMC) kept the risk of skill loss (especially due to projected retirement rates) among the top ten risks to be reduced.

Impact of the 2006 Workforce Plan

The 2006 Plan has led to specific succession plans for 15 managers and critical skill experts. Staffing decisions are increasingly factoring in succession needs, and advance hires are used to provide time for overlap. A Service Agreement policy for employees participating in significant training programs has been developed. In addition, it is now recognized that it is crucial for BPA to reestablish its recruitment program and analyze its compensation strategy.

BPA Strategic Objectives as drivers of the WP

All four pillars of the agency's strategy, system reliability, low rates, environmental stewardship and regional accountability, are dependent upon the agency's ability to recruit, develop, and retain a talented and diverse workforce. Specific strategic business objectives driving the WP include:

- I1: Effective cost management (with an emphasis on best practices, innovation, and simplicity,) through our systems and processes
- I3: Risks are managed within acceptable bounds
- P1: Leaders set clear direction and are accountable for results
- P2: BPA invests in a talented workforce to achieve strategic results
- P3: Effective feedback motivates and aligns employees around meaningful work
- P4: Positive work environment enables its people to do their best work

BPA's FY 07 key agency targets include "Workforce gaps are closed: Agency Workforce Plan is implemented and identified actions are taken to effectively recruit, retain, and develop critical skills and occupations."

WP performance indicators for this target are included in the organization's balanced scorecards and on management performance contracts, thus ensuring that treatments are directly linked to agency objectives.

I. Context

The federal workforce is aging and retiring while the replacement pool of skilled workers is shrinking. With a workforce of 3000, BPA is a microcosm of the national labor pool, with some distinct advantages and challenges when it comes to attracting and retaining the diverse talent we need.

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External Labor Market

The three major components of the external labor market that are pertinent to how BPA strategically develops and staffs its future workforce are:

- Changing Workforce Demographics
- The Labor Market: Future Supply and Demand
- Compensation: Wages and Benefits

As much as possible, conclusions were developed that were based on well-grounded workforce data and projections from Oregon and Washington. In some cases, national data was used as either a benchmark or a proxy for incomplete state data. Articles and publications that tended to lack a sound analytical framework were avoided.

In the coming decade, there are several opportunities BPA can use to its advantage. First, private sector is scrutinizing and consistently cutting its benefits. This is especially true for pensions and post-retirement health care. On top of that, the current base wage discrepancies between private sector journey level positions and BPA wages are not overwhelming.¹ Second, the future labor market demands for critical BPA occupations are only slightly increasing over the next decade. Third, as tuition and interest rates for higher education increase, it appears that there could potentially be a nationwide increase in the number of individuals pursuing blue collar careers. This is already materializing in the increased number of graduates from two-year technical institutions.

On the other hand, there are several challenges BPA must prepare to address. For leadership positions (e.g., engineering managers, top executives), not only is BPA's compensation system lacking, but demand for these positions from the private sector is going to greatly increase over the next decade. It is highly likely that BPA could experience raiding in its leadership ranks from private sector firms. At the journey level, it was mentioned above that the overall labor market demand will most likely remain steady, but this does not take into account the rapidly decreasing supply of skilled workers due to baby boomer retirement. The big question here is whether or not the steady number of college graduates will make up for these losses.

Finally, the current BPA workforce environment might not be poised to attract the new generation of workers. In order to do so, BPA needs to increase internal promotion opportunities, allow for the most flexible workplace as possible, utilize a more liberal compensation strategy, and market these attributes as much as possible. In concert with these efforts, BPA must also take advantage of the changing diversity in the labor market and be proactive in its efforts to recruit and retain women and minorities.

See Appendix A for the detailed report on External Labor Market Issues.

Governmental Context

The following are external governmental factors or issues outside of BPA's direct control which may affect the BPA workforce or specific occupations within it.

¹ Based on Bureau of Labor Statistics. Does not include bonuses, overtime pay, etc.

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New Fiduciary Regulations require BPA to allocate and invest additional and possibly increased resources to be in compliance with the Sarbanes-Oxley Act. This will involve rigorous tracking with affected offices in Regulatory Affairs, Internal Audit and Finance. New regulations will also require related training for managers, process owners, accountants/auditors to manage the abundant flow of information/directives.

Columbia Grid Formation will likely in time compete for some BPA skill sets, although it may also reduce/replace BPA's need for those same skills (Transmission Planning and Operations, specifically electrical engineers, power system engineers and economists).

New Federal Directives require an agency-level Human Capital Plan among other requirements to "stay green" under the President's Management Agenda (PMA). Other directives address COOP plan requirements, and cyber and physical security workforce training and regulations. In carrying out these directives, BPA must make sure that we have and can retain the workforce we need.

Affirmative Employment Program and Civil Rights Regulations (MD715). BPA has struggled to achieve parity for many years, and the gap between BPA's current representation and what it should reflect continues to increase. Our nation's diversity is increasing and BPA must also increase the representation of categories with under representation. Additionally, BPA is in direct competition with other agencies seeking to do the same from perhaps an even smaller potential applicant pool.

See Appendix B for additional details on government impacts in the BPA workforce.

Additional Federal Hiring Barriers - Challenges to the speed with which job offers can be made:

Homeland Security Presidential Directive 12. HSPD-12 prolongs the hiring process which will cause BPA to lose candidates to competition who can offer a start date in 3 days versus 3 weeks. BPA is also very limited in its ability to hire foreign nationals. There is no tolerance for foreigners from a country on the sensitive countries list. This impacts engineering and IT staffing options and our ability to compete in the marketplace as many of our competitors are going to China, India, etc. to find skills/ resources. Moreover, hiring officials must allow considerably more lead time to begin the hiring process. Background investigation workloads will increase, as some number of prospective hires may decline job offers after the investigation has been initiated, preferring to find other employment because of the delay. HSPD-12 affects our ability to recruit and utilize student and contractor hires on a timely, effective schedule. Not only does

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the limit of HSPD-12 endanger our ability to attract and recruit but overall, it increases our cost of hiring.

Compensation. The Federal Government has long struggled but recognized the need to competitively compensate, in particular at the level of senior managers. It should be noted that Office Personnel Management (OPM) is moving to a pay for performance standard that will require agencies to tie cash awards directly to performance ratings with the intent of greater recognition for high performers. All employees receiving cash awards must be rated at least at the “fully successful” level. This does not affect the executives (which are already governed by its own SES performance management system) and it does not work for agencies operating on a pass/fail performance review system. Some of the disadvantages as perceived by the Union are the discouragement of teamwork and managers’ inability to fairly evaluate employees resulting in disparate treatment and adverse impact on certain groups of employees.

A recent study done by the Merit Systems Protection Board concluded that the federal hiring process was cumbersome and a barrier to attracting high-quality candidates. It also provided a number of recommendations to the OPM.

See Appendix C for more BPA Workforce Demographics.

Summary of the Context for this Workforce Plan

Key changes that are or will further impact the workforce and the WP:

- The new workforce will bring **greater diversity**, different work expectations and work-life values as compared to their more seasoned counterparts. This will require an appreciation for, and a valuing of differences in the workplace to retain the new workforce.
- **Technology** advancements continue to accelerate. BPA's ability to stay on the front edge of technology tools for work will impact our ability to recruit and retain a highly skilled workforce.
- Federal salaries are not comparable for experts in several critical occupations compelling us to revisit the use of **additional compensation tools** and **to encourage another reason to work for BPA**.
- BPA's new **performance appraisal system** for employees – impact is yet to be determined
- Agency **process improvement targets** will strain resources in some occupations and skill areas as well as surface reskilling needs and possible surplus skills.
- Achieving "**One BPA**" through the alignment of organizational structure, governance, systems, processes, leadership and culture will impact the cross agency use of resources to address workforce planning needs, and will require clear HR guidance and communication on what HR will lead across BPA, what HR is not taking on but supports the business units pursuing on their own and what BPA must postpone given the existing priorities and limited resources.
- External **recruiting tactics** are evolving as demand creates new shortage occupations (accountants, risk analysts, engineers, cyber security) which impacts our ability to recruit experienced professionals
- Federal hiring processes are cumbersome and changes are anticipated.

II. Risk Identification

Scope of the 2007- 2009 WP

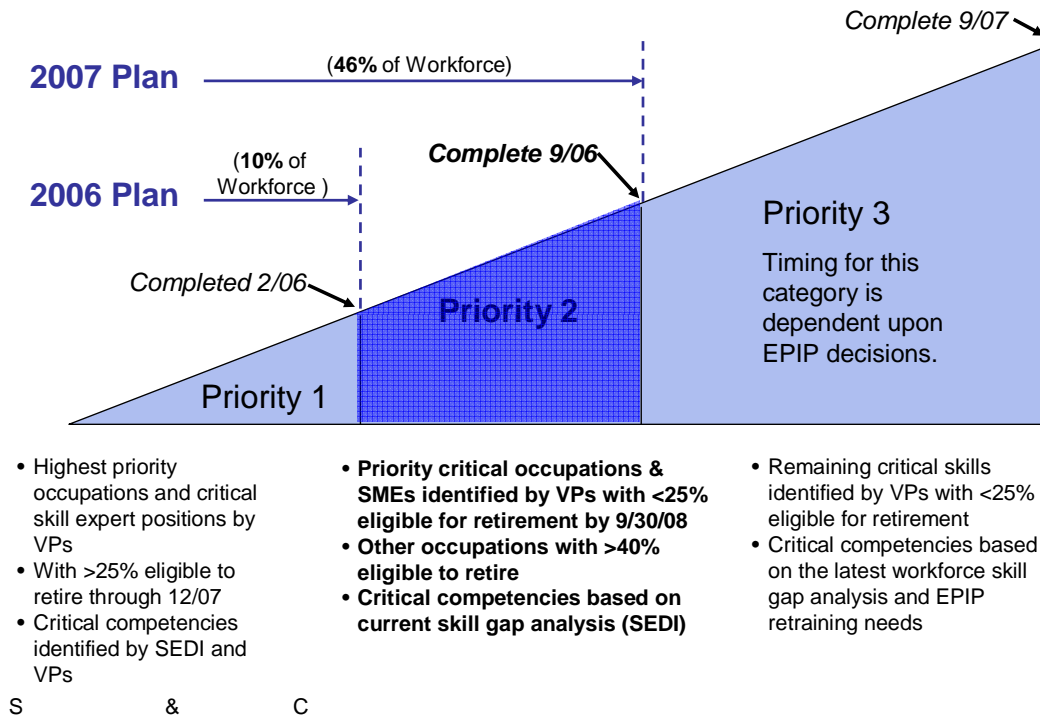
The 2006 WP focused solely upon Priority 1 critical competencies and positions with more than 25% eligible to retire through December 2007.

The 2007-2009 WP combines the Priority 1 positions still at risk, the Priority 2 critical competencies and positions, and any occupations with 35% or more of the incumbents eligible to retire by 9/30/08. The WP also addresses critical competencies based on current skill gap analysis. Also, the similar Priority 1 critical skill expert positions have been clustered rather than presented individually.

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The illustration below identifies the scope of this plan in relation to the 2006 plan and the next plan.

2007-2009 Human Capital Workforce Plan Scope



See Appendix D, BPA Workforce Plan Priorities, February 1, 2006 for the initial list, and Appendix E for the 2007 Workforce Plan Scope.

III. Risk Analysis Results

The risk “threshold” was established by the initial prioritization in the 2006 WP, in which all of the skill gaps appeared moderate to highly likely to occur (none unlikely). All then received treatment plans. The updated assessment found some to have moved on the risk map for reasons noted in the following chart:

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Updated 2006 Risk Map for Priority 1 Critical Skills and Critical Skills Experts

Raw Score		Consequence				
		Insignificant 80-89	Minor 90-99	Moderate 100-109	Major 110-119	120 +
		No significant problem	Can deliver objectives while treatment is indefinitely deferred (adequate controls)	Can only sustain objectives over time with treatment (insufficient Controls)	Unable to deliver objectives until treatment	Unable to deliver objectives until treatment; No plan
Likelihood	Highly Likely > 80		PGK PUS Loads & Transmission (1) PGS Power Ops Spec (2)	DKC Web Master	CHM HR Spec (Empl Relations) (1) CHE HR Specialist (1) PSW Account Execs (2)	PFF Financial Analyst/ Industry Econ (2) PGP Hydraulic Engineers (2)
	Likely 60-79%			TF PSC Craftsman TF SPC Craftsman	SES Mid-Managers	TF Hourly Foreman/ Chief Operator
	Moderate 40-59%		TBL Public Policy Analysis	TF Lineman Journeyman	PSR Power Revenue Analyst	TBL Contract Dev & Admin
	Unlikely 20-39%					
	Rare < 20%					

Reasons for changes in level of risk:

1. EPIP – process improvement under way (standardized processes, efficiencies, process documentation, makes staffing and knowledge transfer more efficient)
2. Understudies/replacements now in place
3. Succession plans are under way or completed
4. Position combined with other related positions in the FY07-09 WP
5. Training curriculum is under way
6. Initial assessment under represented the risk.

The analysis process used the 2006 WP list of controls, position/occupation background analysis and management interviews to determine the level of risk and possible treatments. The results were entered into a risk consequence and likelihood matrix and are displayed in the following risk map using consequence and likelihood scales to identify the biggest risks.

A frequent unknown in the risk analysis was the impact of EPIP-based decisions on future staffing levels.

The scoring structure for the consequence factor (y-axis) used in the 2006 WP has been updated to more accurately reflect the impact of the potential skills loss. As a result, the rating categories have been modified with the locations of skills and positions changing accordingly.

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		Inconsequential	Minor	Moderate	Major	Catastrophic
		<-20	-19 to 0	1 to 39	40 to 79	>80
Highly Likely	>80%	1160 Financial Analysts ; KF 1370 Cartographer; TRSP 344 Management and Program Cl; C 503 Financial Clerical and As; KFR 1083 Technical Writing and Edi; DRW 4417 Offset Press Operating; CE 1171 Appraising ; TR 3806 Sheet Metal mechanic; TFHG 4102 Painters ; TFHG 5703 Motor Vehicle Opr. ; TL 3414 Machining; TFHG	1170 Realty Specialist; TR 2181 Aircraft Operations; TC 1152 Production Control ; TFHG 2101 Transportation Speci; TL 2130 Traffic Management ; TL 1670 Equip Spec. (Pool Se; TFHP 2050 Supply Cataloging ; TL		1101 Risk Analyst; DP 028 Environ Protec. Spec & CSEs; KE	Critical Skill Experts; P 15
Likely	60 to 79%	4749 Maintenance Mechanic; TF, TOV	5210 Rigging; TFH 4607 Carpenters ; TFHG	Senior Executive Service; BPA Managers (w subordinate mgrs); BPA 855 Electronic Engineers; TN/TO/TP 850 EE Engineers; TN/TO/TP	2604 PSC Craftsman; TF 3359 SPC Craftsman; TF Customer Support Services; KS in 07	2810 Lineman Journeyman;TF Hourly Foreman/Chief Operator; TF
Moderate	40 to 59%	6907 Materials Handler ; TL/TFH 501 Financial Administration ; KF, TL 1084 Visual Information ; CG, DK	809 Construction Control; TNFE	855 PSC Field Engineers; TF 260 Equal Employment Opportunit;; CE 850 SPC Field Engineers; TF		
Unlikely	20 to 39%	401 Natural Resource Spec; TF	1601 Gen. Facilities & Eq; TF	First level Annual Suprs; BPA	482 Fishery Biologist; KEW	Critical Skill Experts; P 5
Rarely	<19%	1910 Quality Assurance ; TL 5803 Heavy Mobile Equip M; TF 1350 Geologist ; TNSE 4206 Plumbing; TF		1712 Training Instructor ; TFT 2150 Aviation Resource ; TC 301 CSE- Spec Asst. to VP; DKW;	480 Fish & Wildlife Biolo; KE	

See Appendix F for a more detailed explanation of the Risk Analysis Process.

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Projected Critical Skill Loss/Gaps for 2007-2009

Plan #	Title/Occupation	Critical Skill Experts	Current Total	% eligible to retire	% projected to leave position by 9/08	Staffing Level Needed 9/08 *** = TBD in EPIP	# of replacements/additions needed * TBD in EPIP	Notes
Category 1								
1	Critical Skill Experts - Power	15	15	100%	50%	15	12/4	All are critical skill experts
2	Hourly Foreman/Chief Operator		106	58%	30%	106	32*	Used four-year retirement window.
2	Linemen		86	25%	25%	86	20*	Used four-year retirement window.
3	Risk Management Analyst	4	15	13%	25%	19	8	Two recent hires - one loss.
4	Environmental Protection Specialist (NEPA) & CSEs	16	50	20%	10%	50	5	Summary of several occupations
2	PSC Craftsman		28	50%	25%	28*	7*	Used four-year retirement window.
2	SPC Craftsman		28	39%	20%	28*	6*	Used four-year retirement window.
5	Customer Support Services & CSEs	7	63	34%	20%	62*	12*	Multiple occupations
Category 2								
6	Communications Web Master		0	0%	0%	2	2	Carryover from Plan 2006
7	Accountants & CSEs	7	31	13%	31%	31*	6*	Accountants and Financial Analyst CSEs
8	Contract Management Specialists		37	21%	21%	37*	8*	
	Senior Executive Service		15	27%	7%	19	5	
	Managers		54	34%	17%	54*	10*	
9	Electronic and EE Engineering -Control, Protection, Data Acquisition, Network Planning, Modeling Engineering	17	217	24%	12%	217*	26*	
10	SPC Field Engineering		39	26%	13%	39*	5*	
10	PSC Field Engineering		24	8%	8%	24*	2*	
Category 3								
11	Misc. Electrical Installation/Maint.		3	67%	67%	4	1	One of 3 is a trainee, Need 3 journey level plus trainee
12	Human Resource Specialist		44	34%	23%	44*	10	
13	Equal Employment Opportunity		4	50%	25%	*	1	

Data is from April 1, 2006 HRmis report

Controls/Treatments

The other controls/treatments considered in the analysis were grouped under the following HR strategies:

- Workforce and Leadership Succession Planning
- Recruitment
- Training and Development
- Management and Employee Engagement and Retention

See Appendix H for a summary of Workforce Plan Strategies.

These agency-level strategies align with those identified in the 2006 plan although Staffing Optimization, called out as a separate initiative in the 2006 WP, is now combined with Succession Planning.

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Current Human Capital - Workforce Skills Gaps and SEDI

SEDI is a cross-agency systematic initiative to identify competencies required for a position, assess the strengths of the incumbent, and assess gaps so that BPA can focus individual, work group, and agency training and development resources on the most critical skill gaps.

BPA is using SEDI to identify and track current workforce skill strengths and gaps. Implementation must incorporate EPIP timelines because it does not make sense to create job profiles on positions in the midst of work redesign, or to have new or temporary supervisors approve job profiles, or self assessments.

The SEDI job profiles, against which individual assessment occurs, are based on the competencies/skills most critical for each position at the full performance level. As there will always be employees in career ladder positions (GS 7, 9 or 11, with a full performance level of GS 12), it is reasonable and appropriate to have any organization reflect at least some skill gaps. However, as the job profiles are based on most critical competencies, those with the largest percentage of gaps would typically be the competencies on which to focus development treatments.

See Appendix I, SEDI STATUS UPDATE for a current status report on the use of SEDI, gaps identified and treatments, and their status.

IV. Risk Evaluation

Those in the moderate to catastrophic range of consequence and moderate to highly likely range for likelihood were assessed to be above the threshold but in the following three categories:

Category 1: Major to catastrophic consequences and likely or above in likelihood and on the 2006 list of critical skills as a priority 1 or 2:

- *Critical skill expert positions - Power Services*
- *Hourly Foreman and Chief Operators in T Field Services*
- *Lineman Journeyman in Transmission Field Services*
- *Risk Management Analyst in the Chief Risk Office*
- *Environmental Protection Specialists (NEPA) and CSEs in Environment Fish and Wildlife*
- *Systems Protection and Control (SPC) Craftsman and Power System Protection (PSC) Craftsman in T Field Services*
- *Customer Support Center positions and critical skills (Policy Analysis and Contract Development and Administration*

Category 2: -Moderate consequence and moderate likelihood, and on the 2006 list of critical skills as a priority 1 or 2:

- *Communications Web Master for Public Affairs*
- *Accountants and CSEs in Finance*
- *Contract Specialists in Supply Chain*

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- *Manager (mid level)*
- *Senior Executive Service*
- Electronics and Electrical Engineer in TN, TO and TP
- SPC and PSC Engineers in T Field Services

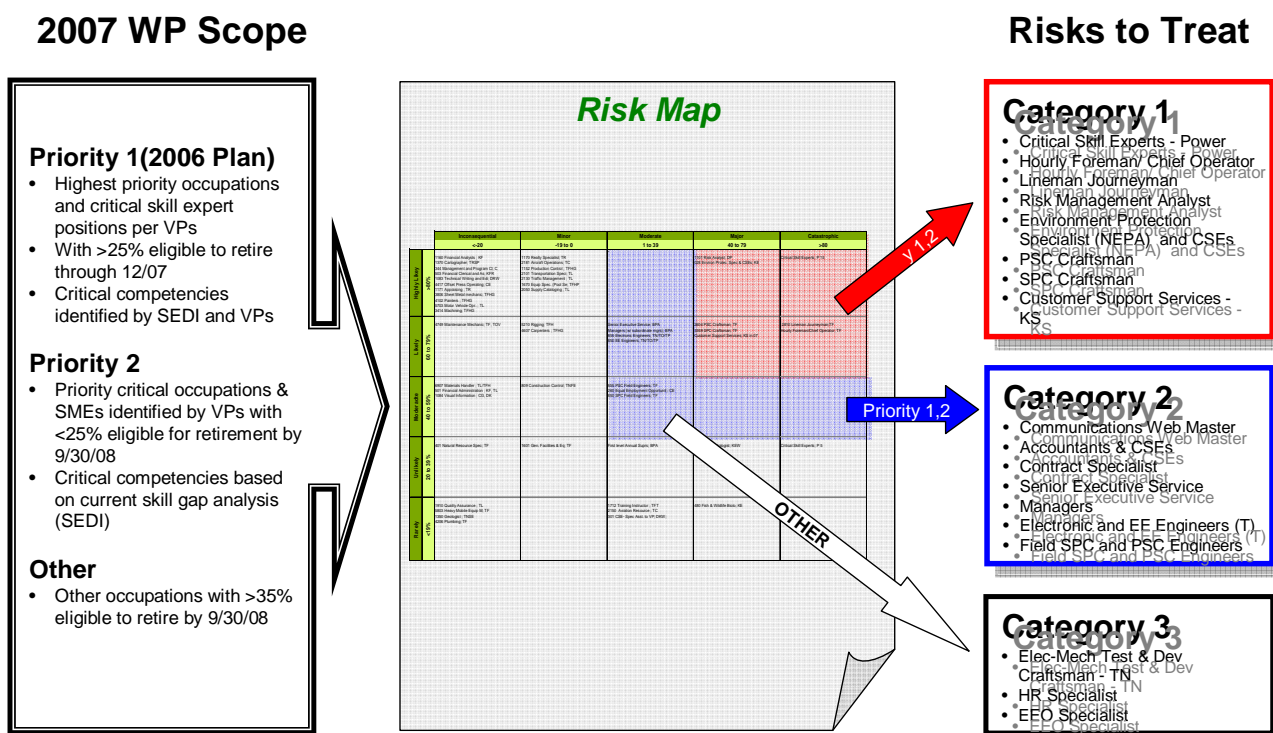
Category 3: Occupations with moderate consequences and moderate or above likelihood and not on the 2006 critical skills list:

- Electrical-Mechanical Test & Dev Craftsman in T Labs
- HR Specialist in Chief Human Capital Office
- Equal Employment Opportunity Specialist in Civil Rights and Diversity Office

Items in *italic* are Priority 1 carryovers from the 2006 WP.

The further breakout into these three categories is to assist in focusing limited HR resources on the critical few. Each of the occupations has a specific treatment plan. Resources would go first to treat Category 1 risks, then Category 2 risks, and finally, Category 3 risks.

What to Treat?



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V. Treatment

Skill gap risk treatments are addressed in two ways:

- Individual treatment plans for each critical occupation or critical skill expert.
- Agency-level initiatives which support the individual treatment plans.

Treatment Matrix summarizes specific treatments

The following Matrix lists the various treatment options across the top and assigns them to the skill gap risk areas down the side. A number “1” indicates a first priority treatment, “2” second and so on. An X represents an important but lower priority. The categories of treatment strategies are indicated across the top.

Plan #	Treatment categories: Numerically prioritized using X for other treatments not identified as a priority (can have more than one priority for each) *** = positions are part of an EPIP in progress OCCUPATION	Succession Planning		Recruitment				Training and Development							Engagement & Retention										
		Position Management	Succession plan (includes process documentation/SOPs)	FTE relief for knowledge transfer	Recruit internally	Recruit externally for diversity	STEP/SCEP Student Interns	Recruitment Incentives	Relocation Incentive	SEDI - skill gap analysis	Priority training	Knowledge transfer tools and consulting	Developmental rotations, cross-training programs	Technical Training Center	Executive Development	Leadership & Mgmt Development	Individual Development Plans	Mentoring - coaching	On-the-job training	Retention incentives	Work place and time flexibility	Educate managers on retention tools available	Service Agreements	Performance Mgmt System	Compensation
Category 1																									
1	Critical Skill Experts - Power		1	2	X	3	X	X	X	X		X						X	X	X					X
2	Hourly Foreman/Chief Operator	X	1	3	X	X			X					2	X	X	X	X							
2	Linemen - Journey-level	X	2	1	X	1	X	X		X									X			X			
3	Risk Management Analyst		X		X	1	X	1	2	X										3					3
4	Environmental Protection Specialist (NEPA) & CSEs	1	1	1		X	X		X		X	X				X	X	X	X						
2	PSC & SPC Craftsman	X*	2	1	X	X			X	X			1							1					
5	Customer Support Services & CSEs	X*	1	1	X	X	X		X	2	X					X	X	X	3						
Category 2																									
6	Communications Web Master					1		X	X	X															
7	Accountants & CSEs	X*	1	1	X	X	2	X	X	X	2	X	2							3	X				X
8	Contract Management Specialists	X*			X	X		X	X	X	2					X	X	X							
	Senior Executive Service		1		X	X			X		3			1	2	1									3
	Managers	X*	1		X	X		X	X		2	3			1	1									2
9	Electronic and EE Engineering -Control, Protection, Data Acquisition, Network Planning, Modeling Engineering	1*	1	1		2	2	3	3	3	X	2	X				X	X			X				X
10	PSC & SPC Field Engineering	1*			X	X	X	X	X	X		2	X						X	3					
Category 3																									
11	Misc. Electrical Installation/Maint.		X	1	2				X																
12	Human Resource Specialist	X*	1	X	X	X			X	X							X	X							
13	Equal Employment Opportunity	X*	1						X																

See Appendix G for a more detailed 2007 Treatment Matrix.

See Appendix H for a Workforce Plan Strategies visual summary.

Agency-Level Treatment Strategies

- Workforce and Leadership Succession Planning: Effectively succession plan for retirements and other departures.

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- Recruitment: Recruit for highly qualified diverse candidates for critical positions
- Training and Development: Train and develop for critical skills to close current skill gaps and to prepare the pipeline to replace current managers and critical skill employees
- Manager and Employee Engagement and Retention: Retain mission critical skills during the upcoming anticipated war for utility industry talent

These four strategies include initiatives already under way with some needed enhancements as well as new best practice initiatives. Some address risks due to retirements and anticipated difficulty in replacing retirees, other types of resignations, current workforce skill gaps.

The following section contains a brief description of each agency-level treatment strategy. While each strategy stands alone, it is presented in this order because each provides a foundation for the next strategy. The focus for all strategies is the category 1, 2, and 3 critical skills list. In other words, given limited resources, they must be applied first to the critical skills and positions.

1) WORKFORCE AND LEADERSHIP SUCCESSION PLANNING

An action plan is in place to assure that there are ready replacements for critical skills ready to retire or at high risk of departure.

Treatment A: Develop and deliver an executive succession system and process. (Continued from 2006 WP)

- Responsible:** Human Capital - Workforce Development – CHD
Timeline: Ready for implementation by _____ (align with HR Balanced Scorecard Strategy)
Outcome: A ready, highly qualified and diverse internal candidate pool ready for executive vacancies.

Treatment B: Succession plans for Priority 1 and 2 critical skill positions/experts identified in the Workforce Plan. (Continued from 2006 WP)

- Note:** Plans address work process improvement, position management, process documentation, FTE needs and means of knowledge transfer
Responsible: Supervisor of the Critical Skill Expert, with support from CH
Timeline: Plans are complete and ready for implementation by 6/30/06
Outcome: All critical skill single points of failure have succession/treatment plans.

Treatment C: FTE to cover understudy skill acquisition time for Priority 1 and 2 occupations and skills.

- Responsible:** Supervisor of the Critical Skill Expert, with support from CHD/CHP

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Timeline: Succession Plan milestones
Outcome: All Critical Skill Experts/single points of failure have understudies

2) RECRUITMENT

Recruitment strategy ensures that BPA has a sustained pipeline of highly qualified and diverse applicants to fill critical occupation/skill areas

Treatment A: Assess and implement recruiting/hiring process best practices.
(Continued and revised from 2006 as an HR-SM EPIP implementation project)

Responsible: Employment and Benefits – CHR and Classification and Compensation - CHP
Timeline: FY 07
Outcome: Diverse and highly qualified candidate pool for each critical skill position.

Treatment B: Align agency strategy to increase representation in critical occupations.

Responsible: Employment and Benefits – CHR, and CHP
Timeline: (align with HR strategy and EPIP project above)
Outcome: Cross -agency support for documented strategy

Treatment C: Establish strategy for entry-level hires in critical positions.

Responsible: Staffing and Classification & Compensation - CHP
Timeline: (align with HR strategy)
Outcome: Increased ability to hire entry-level employees in critical skills

Treatment D: Re-establish recruitment program with strategic initiatives and 3 year Plan at level required to align with Workforce Plan.

Responsible: Employment and Benefits – CHR
Timeline: (align with HR strategy and EPIP project above)
Outcome: Diverse and highly qualified candidate pool for each critical skill position.

Treatment E: Establish BPA brand as employer of choice in the national labor force as a recruitment initiative.

Responsible: Employment and Benefits – CHR
Timeline: (Align with HR Strategy and EPIP project above)
Outcome: Diverse and highly qualified candidate pool for each critical skill position.

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3) TRAINING AND DEVELOPMENT

Focus and leverage training and development resources on critical skill gap closure.

Treatment A: Develop agency training plan focused on critical skill gaps.
(Continued from 2006 WP)

Responsible: Workforce Development – CHD with managers
Timeline: Agency training needs assessment in Q1-FY2007
Priorities and resource requirements established in time to guide FY 08 budget cycle
Outcome: Curriculum focus on highest priority gaps in FY 08 and beyond.

Treatment B: Get all occupation job profiles into the Competency Module in HRmis for skill gap assessment and career planning. (Continued from the 2006 WP)

Responsible: Workforce Development – CHD with managers
Timeline: FY 07: Complete remainder of Priority 1 and 2 positions not under EPIP
FY 08: Begin Priority 3 positions
FY 09: All remaining occupations completed
Outcome: Workforce skill gaps identified at all levels to drive training needs assessment and training plan

Treatment C: Deliver curriculum for priority skill gaps - See Appendix J, Training and Development Plan FY 2007-09

- Public Policy Analysis Competency,
- Power and Transmission Contract Development, Negotiations and Administration Competencies,
- Required training (Internal or External regulations or policy driven)

Responsible: Workforce Development – CHD
Timeline: In alignment with HR strategy
Outcome: Curriculum is offered and closes critical skill gaps

Treatment D: Design and implement an executive and management leadership program aligned with BPA vision, values and strategy,
Executive Development
Management development
First level annual supervisor
Hourly foreman and Chief substation operator

Curriculum is to include Hiring and Staffing, Managing Diversity including Intercultural Competence and other critical leadership competencies at BPA).
(Continued from 2006 WP)

Completed programs must strive for increased representation.

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Responsible: Workforce Development – CHD with cross agency support
Timeline: (In alignment with HR strategy)
Complete system design by 9/30/06. Delivery begins in 2007.
FY 07- Implementation plan approved and resourced
Foreman Preparation/Development program begins
FY 08 – Management curriculum updated
Outcome: Curriculum is offered and targeted management and leadership skill gaps are reduced.

Treatment E: Develop Knowledge Transfer and Cross Training Programs to support succession and training and development for critical skills. (Continued and updated from the 2006 WP)

Responsible: Human Capital - Workforce Development – CHD
Timeline: Establish agency direction and plan in FY 07
Deliver process and tools to support succession and skill acquisition in FY 08
Outcome: Knowledge transfer, rotational and cross training assignment objectives defined and regularly met based on assignment closeout assessments.

4) MANAGEMENT AND EMPLOYEE ENGAGEMENT AND RETENTION

Leverage engagement, retention incentives and tools on critical skills to reduce the number of separations.

Treatment A: Develop compensation strategy that guides use of all compensation, including awards, recruitment, retention and relocation policy and tools. (Review compensation policy and practices to align with BPA strategy, vision and values and implement related policy for recruitment, retention and relocation incentives.)

Responsible: HR Strategy, Policy and Planning – CHE
Timeline: Complete in FY 07
Outcome: BPA is competitive in recruitment and retention of employees in critical skill areas.

Treatment B: Evaluate and revise performance management systems based on best practices.

Responsible: HR Strategy, Policy and Planning – CHE and CHM
Timeline: Complete Managers system in FY 07
Complete Employee system in FY 08
Outcome: Managers understand and can use the strategies appropriate for specific positions with critical skills.

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Treatment C: Educate management about agency engagement and retention tools and how to use them. (Continued and updated from 2006 WP)

Responsible: Employee Relations – CHM/CHP/CHE
Timeline: Implement within 30 days of approval of 3R policy
Outcome: Managers understand and can use the strategies appropriate for specific positions with critical skill needs.

Measuring whether the risk is actually being reduced

Many of the specific treatment plans call for actions once EPIP implementation decisions are completed. Some plans may need revision in approach as well as dates depending upon the implementation decisions and other risk which can actually increase during the treatment period for one or more of the following reasons:

- More retirements and separations than initially projected and planned for,
- The treatment plan design was somehow inadequate
- The treatment plan is not being fully implemented
- The composition of the workgroup or the group's mission has changed.

The following language is included in each treatment plan:

“The level of risk will be re-measured at least annually to determine whether the treatments outlined herein are actually reducing the skill gap risks as intended. FTE related treatments will be revised to factor in any changes in the number of retirements, retirement eligibility, retirement projections, or changes to workgroup composition, work, or mission. “

See Appendix K for the Agency-Level Strategies Implementation Plan.

HR Strategy

An elemental component of the WP is its alignment with the overall HR Strategy. This will be accomplished via alignment with the HR Balanced Scorecard and the following activities:

- Align HR resources around the Human Capital - Workforce Plan Priorities (CHCO)
- Monitor treatment status quarterly (CHE)
- Monitor EPIP decisions regularly on impact of retraining, retooling, redeployment needs that influence Human Capital - Workforce planning (CHE)
- Update the plan at least annually (CHE)
- Integrate agency-level HR initiatives into CH management performance contracts (CHCO)

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- Regularly communicate findings, focus and priorities to BPA managers and HR Community as part of overall HR communication strategy (CHCO/CHE) (See Appendix L for Communication Plan)

Responsible: HR Strategy, Policy and Planning - CHE

Timeline: Quarterly risk and treatment indicator analysis update;
At least annual Human Capital - Workforce plan updates

Outcomes: Managers understand and use the risk informed treatment strategies appropriate for their specific skill gap risks.
Skill gap risks are effectively managed – reduced to an acceptable level of risk.
There are no significant workforce planning surprises in HR Management

Implementation Risks and Barriers to Achieving Agency-Level Treatment Strategies – An update to risks identified in the 2006 WP

There are a series of risks that could potentially hamper the effectiveness of the WP. It is important to call these risks out and identify the treatments specifically aimed at mitigating them. Most of the risks were identified in WP 2006 and have now been updated to include any changes that have occurred over the last year. They are as follows:

Risk 1: Workforce skepticism based on past experience. “What is different this time?” “Who is going to read/use this anyway?”

Treatments begun in FY 06:

- Clear purpose, vision, need/drivers and objectives communicated consistently at the top levels of leadership (ERMC, the BOB, and at the All Managers Meetings, HR Updates and BPA Today)
- Visible sponsorship by the front office – Holding VPs accountable for related contract items
- Tracking progress and including subsequent targets in the agency People and Culture BSC and VP contracts as needed

Add:

- Quarterly updates on progress and issues to the BOB (CHCO/CHE)
- Recognition of organizations doing effective succession planning (COO)
- Communication plan integrated with other cross agency communication agenda – As a key agency target this may occur without special effort (CHE/CPAO)

Risk 2: Lack of alignment among the Human Capital - Workforce Plan and other agency-level initiatives and processes (e.g., the COG and reorganization, EIPs, Labor Negotiations, Position Management, VSI/VERAs etc.)

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Treatment begun in FY 06:

- Up front recognition of the interdependency between WP staff and/or HR management and leads for the COG and EIPs.
- Regular updates among these groups. Motto: Best for BPA and no surprises.

Add:

- Enhance communication between the WP project team and the HR Strategic Business Partners about linkages between HR and Business Units with WP targets. (CHE/CHCO)

Risk 3: Sustaining senior/front office sponsorship.

Treatments applied successfully in FY 06:

- Tie the treatments to VP level contracts, so that each initiative requires clear roles and responsibilities
- Outcomes are reflected in performance element standards and quarterly progress reports as outlined in the risk and treatment indicators established this year. Revise contracts where necessary to ensure aligned expectations.

Add:

- Use the 2007 WP treatment plans action page as an amendment to VP performance contracts.
- Formalize a cross-functional workforce planning and execution team to ensure continued shared ownership and sustained sponsorship

Risk 4: Competing new priorities for managers and/or for HR, causing workforce planning treatments to get insufficient resources and attention to achieve treatment objectives.

Treatments to improve upon:

- Focus limited resources where they can have the greatest impact on the biggest risks.
- Don't over-commit in the first place.
- Commit to new priorities only if resources allow after an assessment as to where the new priority lies in relation to the existing priorities.
- Regularly assess HR priorities and resource allocation to work through issues surfaced, including revising targets, dates, or resource allocation. (CHCO)

Risk 5: (New for this plan) Workforce planning is a key HR process and will require sustained staff resources. The current project lead intends to retire in January 2008 and there is only minimal FTE dedicated to the work at this time from other sources.

Treatment: Identify an FTE and understudy to work with the project lead through the process this year: (at least .5 BFTE)

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Major duties include:

- Communicate this plan to the agency, managers with treatment actions and HR community
- Monitor and report progress quarterly
- Complete the EPIP for the repeatable agency wide workforce planning process
- Be a resource to a variety of WP treatment action SMEs or teams
- Assess agency skill risk and develop treatment plans
- Prepare the annual WP update and related presentations.
- Deliver results that have cross agency support

VI. Monitoring the Workforce Plan and Communication Implementation – Updated from the 2006 WP

Human Capital - Workforce Plan Monitoring will include:

- Quarterly Risk and Treatment Indicators status report to the ERMC.
- Quarterly performance progress reports to Strategic Planning for the Agency Balanced Scorecard.
- Human Capital - Workforce Plan quarterly updates to the CHCO and the COO on any outstanding sponsorship level issues and opportunities to acknowledge treatment objectives met by managers and VPS.

The Human Capital - Workforce Plan Communication strategy (Appendix L) is to collaborate with HR to provide integration and alignment through regular plan updates to managers and employees and linking resources for their use.

VII. Human Capital - Workforce Planning Resource Requirements

Agency-level HR guided Treatment Resource Requirements: (need to reassign or add to existing resources if Category 2 occupations are to be treated.

Reestablish Recruitment strategy and program: 1 FTE for CHR

Knowledge-Transfer/Cross Training Programs: 1 FTE for CHD

Training to support critical skill gaps: 1 FTE or CFTE

Organizational level resources to apply treatments:

Manager's time to establish and execute:

- Succession plan for each Critical Skill expert eligible to retire by 9/08
- SEDI for remaining priority 1 and 2 positions

Critical Skill Experts time to:

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- Establish job process documentation for standardized work
- Transfer knowledge to selected individuals

Trainee time to execute a development plan.

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Sponsors:

CHCO, Civil Rights Diversity & Conflict Resolution, Chief Risk Officer, VP for Internal Business Services

Appendix A: External Labor Market

External Labor Market

Summary

The following section assesses three major components of the external labor market that are pertinent to how BPA strategically develops and staffs its future workforce.

These are:

- Changing Workforce Demographics
- The Labor Market: Future Supply and Demand
- Compensation: Wages and Benefits

Whenever possible, this report tried to develop conclusions that were based on well grounded workforce data and projections from Oregon and Washington. In some cases, national data was used as either a benchmark or a proxy for incomplete state data. Also, this report avoided using articles or publications that tended to lack a sound analytical framework.

In the coming decade, there are several opportunities that BPA can use to its advantage. First, private sector benefits are being further scrutinized and consistently cut. This is especially true for pensions and post-retirement health care. On top of that, the current base wage discrepancies between private sector journey level positions and BPA wages are not overwhelming.² Second, the future labor market demands for critical BPA occupations are only slightly increasing over the next decade. Third, as tuition and interest rates for higher education increase, it appears that there could potentially be a nationwide increase in the number of individuals pursuing blue collar careers. This is already materializing in the increased number of graduates from two-year technical institutions.

On the other hand, there are several challenges BPA must prepare for. For leadership positions (e.g., engineering managers, top executives), not only is BPA's compensation system lacking, but demand for these positions from the private sector is going to greatly increase over the next decade. It is highly likely that BPA could experience raiding in the leadership ranks from private sector firms. At the journey level, it was mentioned above that the overall labor market demand will most likely remain steady, but this does not take into account the rapidly decreasing supply of skilled workers due to baby boomer retirement. The big question here is whether or not the steady number of college graduates will make up for these losses.

Finally, the current BPA workforce environment might not be poised to attract the new generation of workers. In order to do so, BPA needs to increase internal promotion opportunities, allow for the most flexible workplace as possible, utilize a more liberal

² Based on Bureau of Labor Statistics. Does not include bonuses, overtime pay, etc.

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compensation strategy, and market these attributes as much as possible. In concert with these efforts, BPA must also take advantage of the changing diversity in the labor market and be proactive in its attempts to recruit and retain women and minorities.

Changing Workforce Demographics

There are three major themes that constitute the expected changes the workforce will experience over the coming decades. The first two trends are captured within the inevitable effect of time—the aging baby boomers and the generations who are expected to succeed them. The third trend is the changing face of workforce diversity.

By 2012, the baby boom generation will represent almost one-fifth of the labor market with the first major wave of boomers reaching retirement eligibility within the next five years³. With the trickle of retirees already growing, some firms have experienced skill gaps due to the resulting losses in experience and abilities. According to most labor analysts, the deficits experienced thus far are nothing compared to what will transpire during the coming decade. Because of this, the external challenge to recruit and retain adequate replacements for skills lost will become highly competitive.

On the other side of the labor market, generations X and Y are expected to fill the gap left by the baby boomers. Most experts agree that there will not be enough workers ages 25-44 to fill the skill gaps left by the boomers, which will place great stress on firms who must leverage their talent. Furthermore, what new generations are expecting from employers is remarkably different from older generations. First, the newer generations will place a greater emphasis on the flexible workplace and expect technology to make that flexibility a reality. The workforce will want to use telecommuting and alternate work schedules to make the most of their time and will feel stifled when technology does not accommodate this (e.g., use of PDAs, laptops). Second, the newer generations are expecting a horizontal labor market where company loyalty and longevity are secondary to mobility and varying opportunities.⁴ Third, the X and Y generations see no problem with working long hours, but also they expect to be compensated for their efforts. Conversely, the newer generation is less concerned with benefits that do not reap short-term benefits such as pensions, life insurance, and post-retirement health insurance.

Another facet of the generational shift is the increased diversity in both gender and ethnicity. Both Asian and Hispanic populations are expected to triple over the next fifty years and will represent the fastest growing groups in the labor force through 2012.⁵ And across all ethnic groups, women will continue to make up more of the labor market. Ultimately, this will force employers to diversify the way they think and act to not only better serve their customers but create an environment where their employees can be as productive as possible.

The Labor Market: Future Demand

³ Corporate Leadership Council (2005) 'State of the Workforce 2005: United States', March 2005, catalog no: CLC132D167.

⁴ Florida, R. (2003) *Rise of the Creative Class*, bibliographic details TBD

⁵ Corporate Leadership Council (2005) 'State of the Workforce 2005: United States', March 2005, catalog no: CLC132D167.

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To understand the future demand in the external labor market, the Washington state labor projections through 2014 were assessed by comparing the increase in critical skill occupations relative to the overall labor force.⁶ For example, if a critical skill occupation is growing at a much smaller rate when compared to the overall labor force, we can assume that the market demand and subsequent competition for that position is likely to remain the same or go down. Conversely, if we see an occupation that is growing at a greater or similar rate than the total labor market demand, we can expect greater competition than we see today.

As shown in Visual A, the occupations that will experience the greatest demand over the next eight years are leadership positions such as engineering managers and top executives. This also was the trend in the national projections. Business and financial occupations (e.g., accountants and auditors) will also see a high increase in demand. Conversely, economists and financial analysts are the subset of this classification where demand will most likely remain stagnant or decrease. In terms of the blue collar workforce, there will be greater demand for the non-electrical crafts like construction, metal, and plastics workers. While these types of occupations do not directly impact BPA's workforce, they do act as a substitute for potential workers who might otherwise work in the electrical crafts.

Two occupations that stand to see a marginal increase in demand are two of the most traditional BPA job types—electricians and engineers of all types. The growth rate for both categories is well below the overall labor market growth for Washington state. This was also true for the national projections, as electricians and electrical engineers saw low growth relative to the national labor force.

There were several occupations common to BPA where market demand will most likely remain stagnant and could potentially decrease. On the blue collar side, the total number of system operators in the workforce will not increase. For white collar occupations, this holds true for economists and engineering technicians. This also the case for financial analysts, but given the increased demand for business and financial occupations mentioned above, it can be assumed that increased demand for other financial occupations will negate this projection.

The Labor Market: Future Supply

There are two major themes that are shaping labor supply projections. First, the baby boom retirement trends are dictating the flow of career employees exiting the labor market. The projected aging and subsequent retirement calculations are strikingly clear. From now through 2030, the U.S. population aged 65 and older will jump from 12.6% to 20.2%.⁷ Broadly speaking, this means that individuals who are older than the traditional retirement age will double during that time span. Furthermore, aging within the eligible workforce is rapidly increasing. While the population aged 25 to 64 will increase by about 12.4 million through 2010, those individuals between 55 and 64 will make up 90%

⁶ Since projections for the state of Oregon were not available, using the Washington state data was used instead of national projections.

⁷ Bureau of the Census (1999) *Current Population Reports*, series P-25, no.1130, reproduced in *Statistical Abstract of the United States*.

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of that growth.⁸ Given these projections, the baby boomer departure is not going to occur overnight. Instead, it will be a slow process over the next three decades.

On the other end of the spectrum, the labor force will be filled by graduates and skilled workers entering specific critical occupations. There have been several reports that the number of math, science, and engineering graduates has been dwindling. While the number of mathematics graduates has been on the decline, a closer look reveals that this is only somewhat true for engineering graduates. For graduates in electrical and electronics engineering, the total degrees granted are down from the record high in 1987, but 2004 recorded the highest number of masters graduates on record and the total number of graduates was above the annual average from the last twenty years (See Visual B). On top of that, the number of students enrolled in electrical engineering graduate programs has steadily increased since 1996 (See Visual C). Outside of engineering, the number of degrees in business has continued to grow steady over the last thirty-five years (See Visual D).

On the blue collar side, an analysis of the number of associate's degree graduates in electrical/power transmission installation⁹ provides a useful measurement in understanding the future supply of electrical craftsmen. While there is a greater degree of sources for skilled crafts than these two-year programs, it serves as a quantifiable proxy for the interest in the electrical crafts. As Visual E shows, the number of graduates from these programs has tripled over the last two decades. If this trend continues, the number of annual graduates could jump from just over 1700 from two years ago to approximately 4800 by the year 2020.

Compensation: Wages

Typically, the general assumption is made that BPA cannot keep up with the private sector in terms of the wages the agency can offer to attract and retain employees in critical skill areas. In order to verify this, the average wages for select occupations from BPA were compared against the average wages for the same positions from Oregon and Washington.¹⁰ To add another point of reference, the 75th and 90th percentile for nationwide median wages were included to show the upper echelons of what certain occupations are receiving at the national level.

As shown in Visual F, the two occupations where BPA wages are lower than the state averages are top executives and engineering managers. For executives, the wage disparity is quite dramatic (approximately \$83K annually). This is less so for engineering managers, as the wage disparity is about \$3.3K annually. For all other positions shown, the average wage paid at BPA is greater than the state average. In fact, several positions at BPA (e.g., biological scientists, accountants) receive wages higher than the national 75th percentile.

Compensation: Benefits

⁸ Purcell, P. (2000) 'Older workers: employment and retirement trends', *Monthly Labor Review*, October 2000.

⁹ This associate's degree category includes: Electrical/Power Transmission Installers, Lineworkers, and Electricians.

¹⁰ State data was compiled from the Bureau of Labor Statistics wage survey conducted in May 2005 (See <http://www.bls.gov/oes/current/oesrcst.htm>). Bonuses, benefits, and overtime pay are not included in the BLS or BPA data.

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Over the past decade, the trend in private sector employee benefits has been a shift of burden and risk from employer to employees. Most studies have attributed this to the increasing number of retirees, competition in the global economy, and rising health care costs.

The transfer of responsibility to employees in terms of retirement savings is already evident. Across the private sector, the traditional pension plans that baby boomers came to expect after World War II are being replaced by with 401(k)-type plans. Most recently, two of the most well known and benefit-heavy firms in the United States, IBM and General Motors, froze the pensions of all their current employees. But, this is not limited to a few large companies. In fact, approximately 42% of all private sector employees are not offered a pension plan of any kind.¹¹

Private sector health care benefits for have also experienced the same type of downsizing. The shift to employee sponsored health care is evident as the number of employers offered health saving accounts increased by 8% in 2006 and another 47% of large firms are considering them as part of their compensation strategies.¹² Furthermore, a Kaiser Family Foundation survey discovered that only 33% of large firms offered retiree health coverage to current employees, which was down from 45% in the year prior.¹³

Visual A

State of Washington Employment by Occupation, 2004 to 2014 (projected), in 000's

00-0000	Total, All Occupations	2004	2014	%	
		3110	3,586	15.3	
11-9041	Engineering Managers	4.9	5.8	18.4	3.1
47-0000	Construction/Extraction Occ.	20.3	23.9	17.7	2.4
51-4000	Metal Workers and Plastic Workers	3.3	3.8	15.2	2.2
13-2011	Accountants	26.6	30.9	16.2	0.9
13-0000	Business and Financial Ops Occupations	144.1	166.3	15.4	0.1
11-1000	Top Executives	21.2	24.4	15.1	-0.2
11-3031	Financial Managers	9.5	10.7	12.6	-2.7
17-2000	Engineers (All Types)	49.6	55.6	12.1	-3.2
13-1111	Management Analysts	13.3	14.8	11.3	-4.0
19-1029	Biological Scientists	0.9	1.0	11.1	-4.2
49-2000	Electrical/Electronic Equipment Mechanics	1.0	1.1	10.0	-5.3
47-2111	Electricians	1.1	1.2	9.1	-6.2
17-2071	Electrical Engineers	3.6	3.9	8.3	-7.0
13-1070	HR, Training, LR Specialists	8.4	8.9	6.0	-9.4
17-2072	Electronics Engineers	2.6	2.7	3.8	-11.5
17-3020	Engineering Technicians	3.1	3.2	3.2	-12.1
13-2051	Financial Analysts	2.0	2.0	0.0	-15.3
19-3011	Economists	0.5	0.5	0.0	-15.3
51-8000	Plant and System Operators	0.2	0.2	0.0	-15.3

Source: http://www.workforceexplorer.com/admin/uploadedPublications/4960_alloccupproj.xls

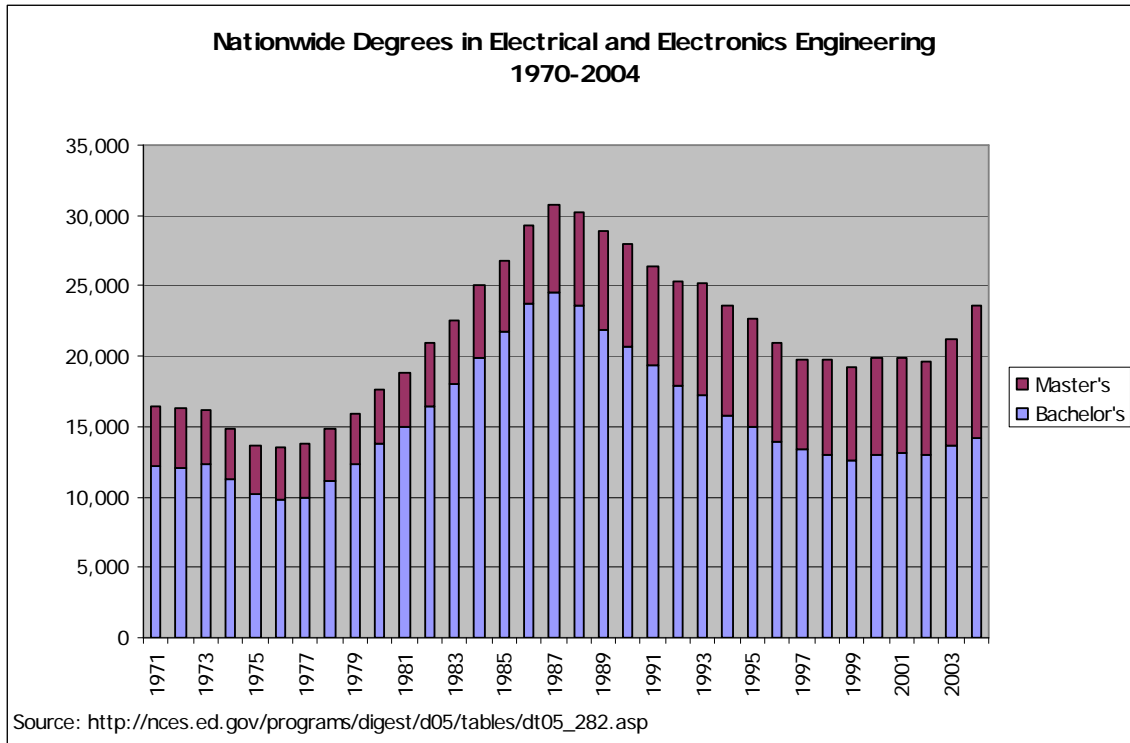
¹¹ Stoll, J. (2006) 'GM to freeze pension plans of white-collar workers', *Wall Street Journal*, 8 Mar 2006, p. A10.

¹² Klaff, L. (2005) 'Covering all the bases', *Workforce Management*, 12 Dec 2005, Vol. 84, No. 15.

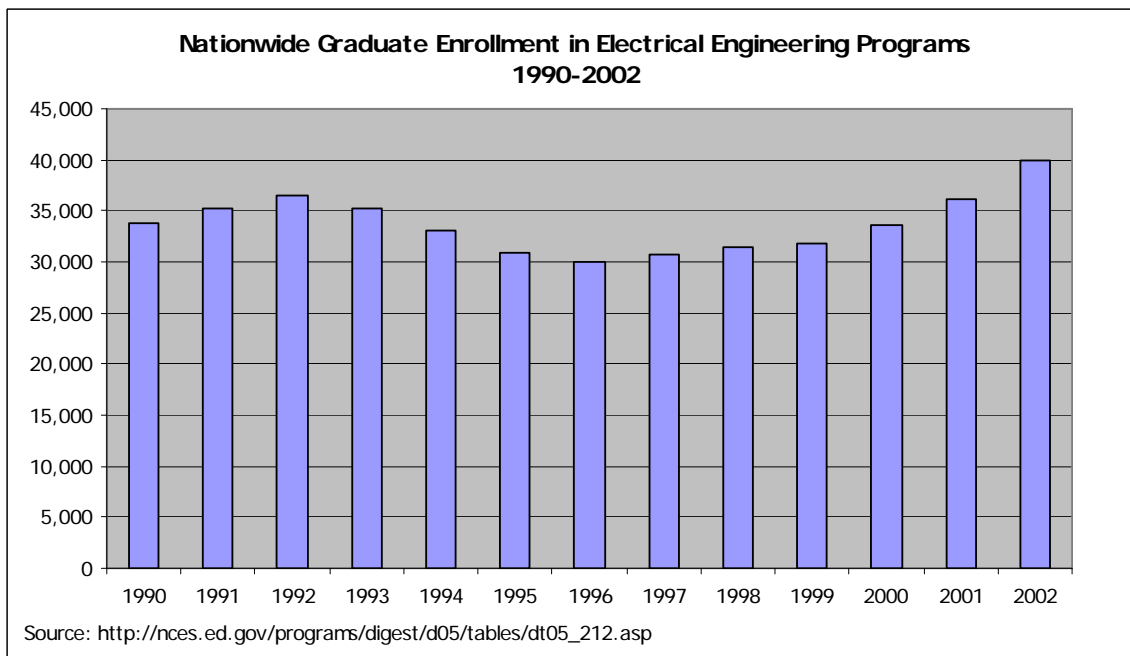
¹³ Franklin, M.B. (2006) 'Disappearing retiree health benefits', *Kiplinger's Personal Finance Retirement Planning Guide*, Washington, Fall 2006, p. 70.

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Visual B

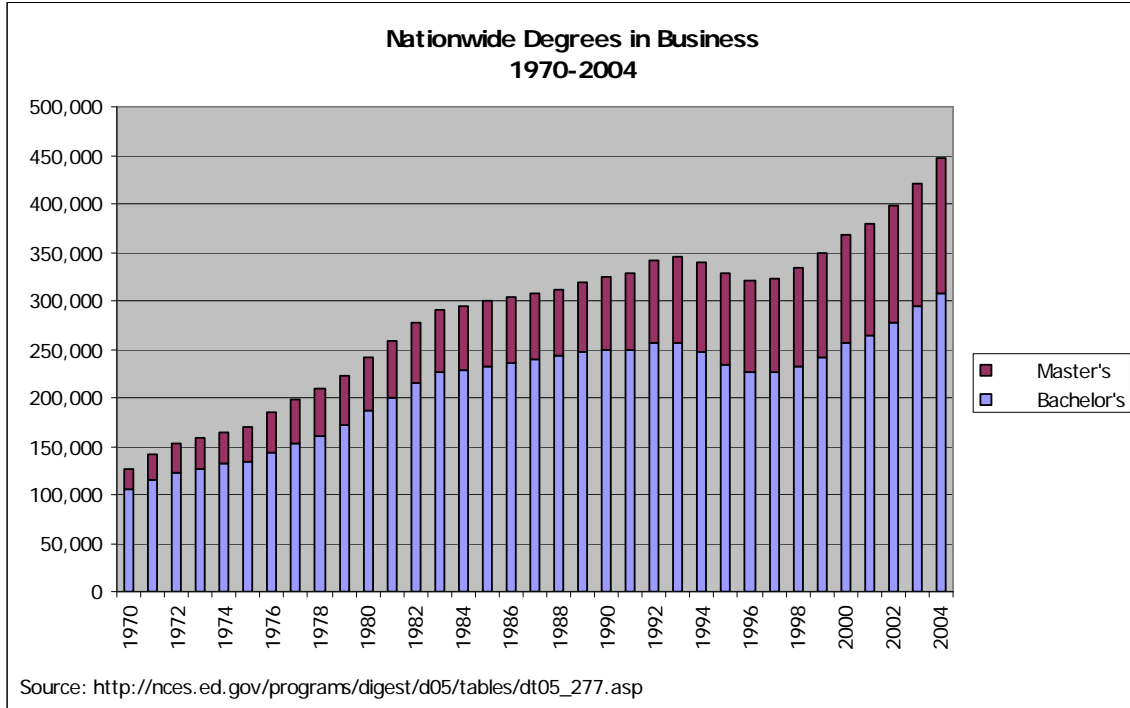


Visual C

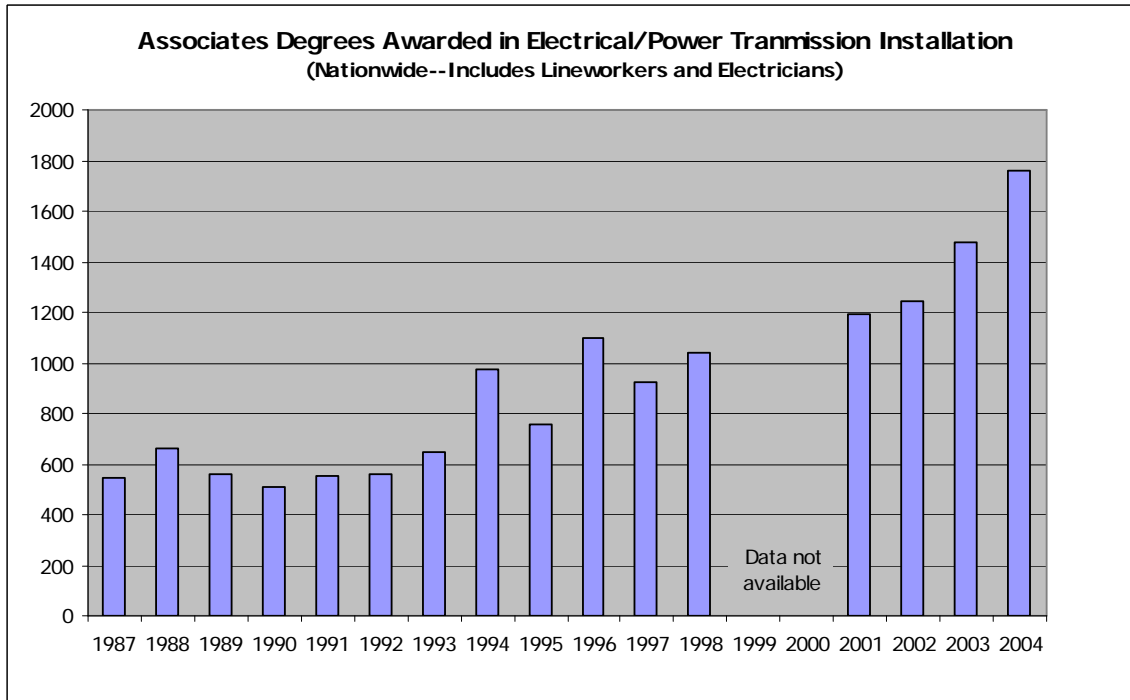


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Visual D



Visual E



Appendix B: Government Impacts in BPA Workforce

Government Impacts on the BPA Workforce

The following are external factors or issues not within our direct control, which would be appropriate to consider as it may affect the BPA workforce and ultimately, the goal of the Work Force Plan.

New Environmental Regulations. New environmental regulatory advances and changes are continually evolving. The challenge is in staying abreast of the regulations and being able to provide the requirements to clients and other stakeholders. For example, just recently, there have been changes in Oregon with respect to culverts that impact construction of access roads. The need for the workforce (specific to the KEW organization) is increased (or maintenance of) training budgets to ensure a thorough understanding of dynamic environmental regulations in order to provide the quality service and expertise to clients. Specific Examples:

1. Environmental regulations include storm water, hazardous material and water quality, among others
2. Some impacted organizations include clients working on construction of access roads, space and dampeners, and wood pole change outs.

New Fiduciary Regulations. This will require BPA to allocate and invest additional and possibly increased resources to be in compliance with Sarbanes Oxley. This will involve rigorous tracking with affected offices in Regulatory Affairs, Internal Audit and Finance. Further there will be increased training needs for managers, process owners, accountants/auditors of new regulatory requirements and how to manage the abundant flow of information/directives.

New Electric Utility Regulations, Columbia Grid formation. New electric utility regulations will be handled by NERC (Transmission Operations and Generation Operations). Industry Restructuring is a special purpose project, not a long term component of BPA, designed to interact with independent regional transmission organizations. This 4th attempt called Columbia Grid is set up to interact with regional parties and dedicated to the effective expansion of our grid. Overtime, as Columbia Grid evolves, there is a high likelihood the new formation will be competing with BPA for certain skill sets (e.g., Transmission Planning, Transmission Operations, specifically electrical engineers, power system engineers and economist). When Columbia Grid is fully developed (~5years), there may be 50 – 100 people in the organization. However, a couple of notes, BPA is one of the major stakeholders in Columbia Grid and will play a big role as the organization evolves (e.g., we will ultimately decide what they do). As a result, our need for specific skills may be reduced/unaffected as Columbia Grid takes over certain functions (e.g., they may attract away resources but they will also be gaining those functions in support of BPA).

Federal Directives. This WP2 will constitute the agency Human Capital plan and the standards we have to meet and contain mandated requirements from the President's

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Management Agenda (PMA), DOE Secretary's initiatives and OPM directives. There is the need to stay "green," requirements to report to DOE on a quarterly basis, policy and procedures affecting cyber and physical security workforce. Consequently, all these initiatives create an extra burden/hoop to jump for the entire agency and will increase the need for additional tracking/reporting requirements across all HR functions. BPA must make sure that we have the workforce we need to carry out our mission.

Push for Knowledge Management (KM). DOE has KM push, which is not a part of the Human Capital initiative but they are referencing the KM website and we have are required to correlate our KM website. Currently, BPA is doing what needs to be done. There are more that we can do (not mandated yet) but we are limited by resources. At this time, there are no emerging expectations or requirements.

EEO and Civil Rights Regulations (MD715). BPA needs to make an effort to increase representation while the rest of the Government is working to do the same but perhaps with even fewer qualified resources available for the skilled positions from underrepresented groups.

Hiring Barriers

In addition to government impediments, the following are various hiring challenges BPA have encounter and will continue to face in the upcoming talent war.

HSPD12 legislation. This legislation has prolonged the hiring and bring-on phase. We lose talent to companies who can offer a start date in 3 days versus our 3 weeks. BPA is also very limited in our ability to hire foreign nationals with a no tolerance for foreigners from a country on the sensitive countries list. This impacts engineering and IT and our ability to compete in the environment as many of our competitors are going to China, India, etc. to find skills/ resources. Moreover, hiring officials must allow considerably more lead time to begin the hiring process. Further, background investigation workloads will increase, as some number of prospective hires may decline job offers after the investigation has been initiated, preferring to find other employment because of the delay. HSPD12 affects our ability to recruit and utilize student and contractor hires on a timely, effective schedule. Not only does the limit of HSPD12 endanger our ability to attract and recruit but overall, it increases our cost of hiring.

Compensation. The Federal Government has long struggled but recognized the need to competitively compensate, in particular at the level of senior managers. It should be noted that OPM is moving to a pay for performance standard that will require agencies to tie cash awards directly to performance ratings with the intent of greater recognition for high performers. All employees receiving cash awards must be rated at least at the "fully successful" level. This does not affect SES (already governed by its own performance management system) and it does not work for agencies operating on a pass/fail performance review system. Some of the disadvantages as perceived by the Union are the discouragement of teamwork and managers' inability to fairly evaluate employees resulting in disparate treatment and adverse impact on certain groups of employees.

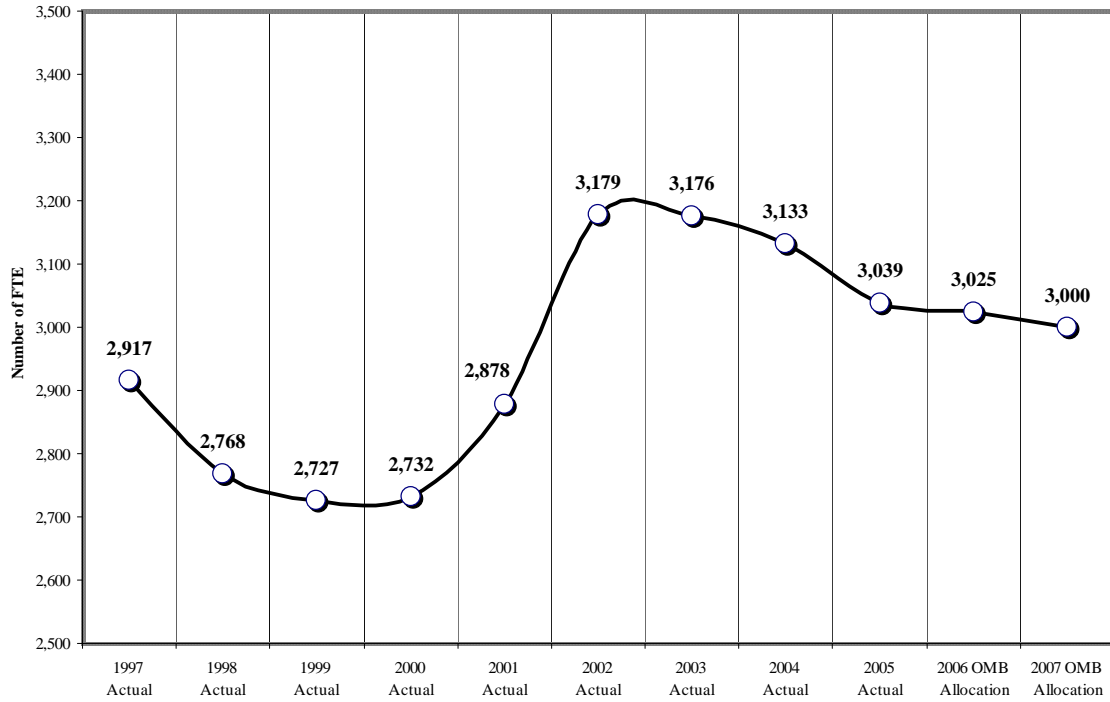
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Emerging OPM occupation standards. The Contract Specialist 1102 series, Computer Specialists, and now HR Specialists 201 series have all been under the radar for certification programs. It should be noted this trend may continue and expand to other occupations.

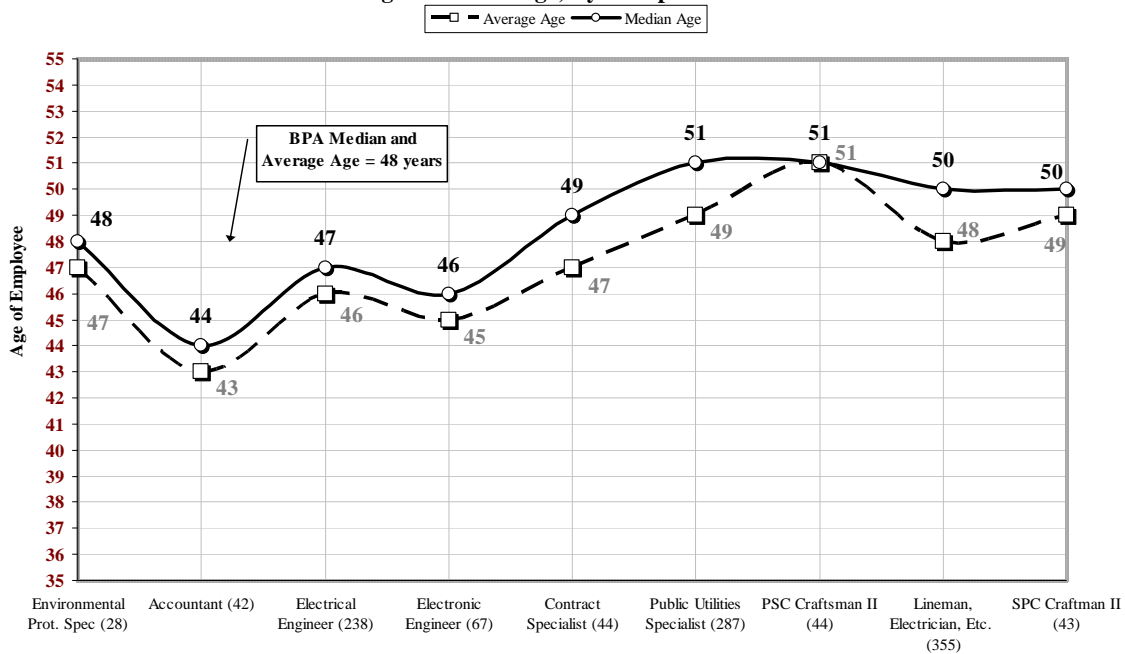
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Appendix C: Demographic Information

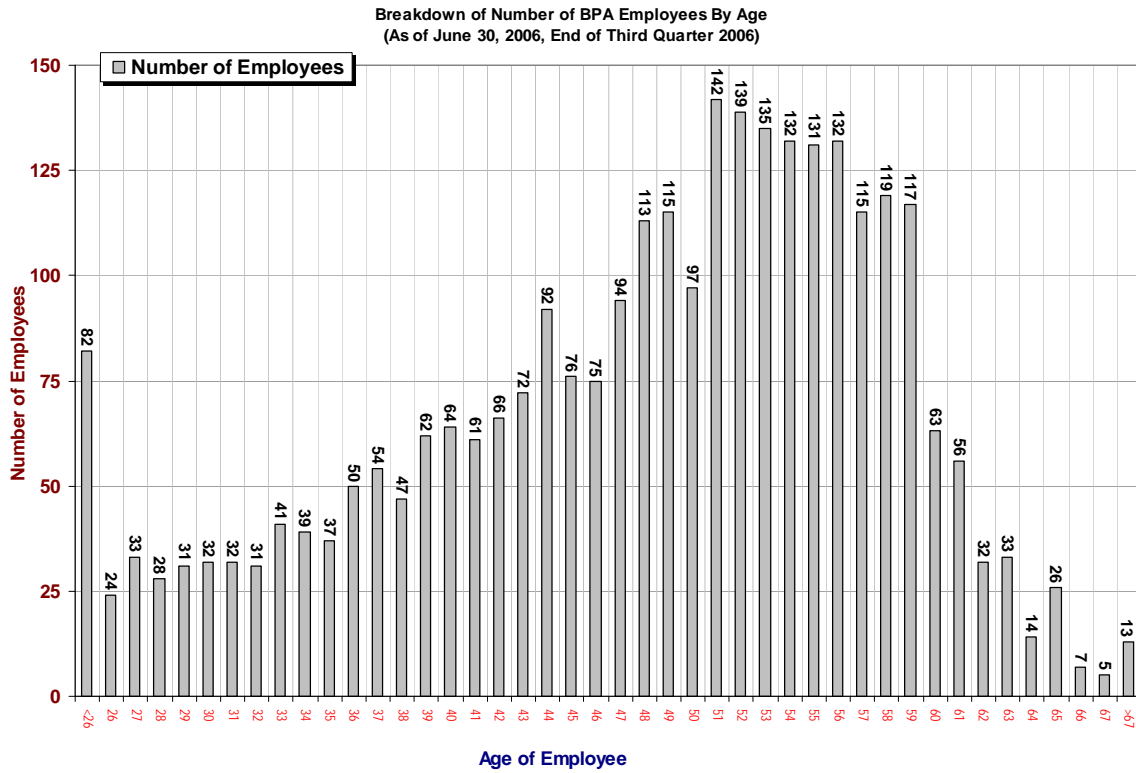
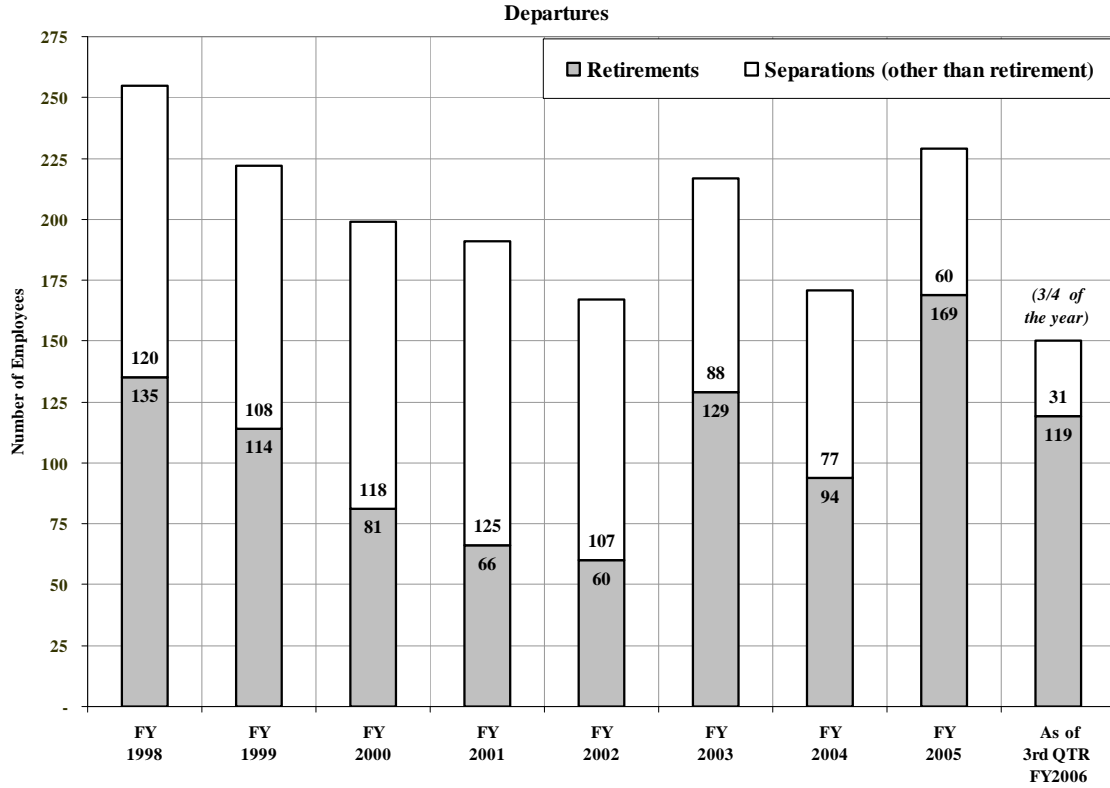
BPA FTE History 1994 to 2007
(As of 3/4/06)



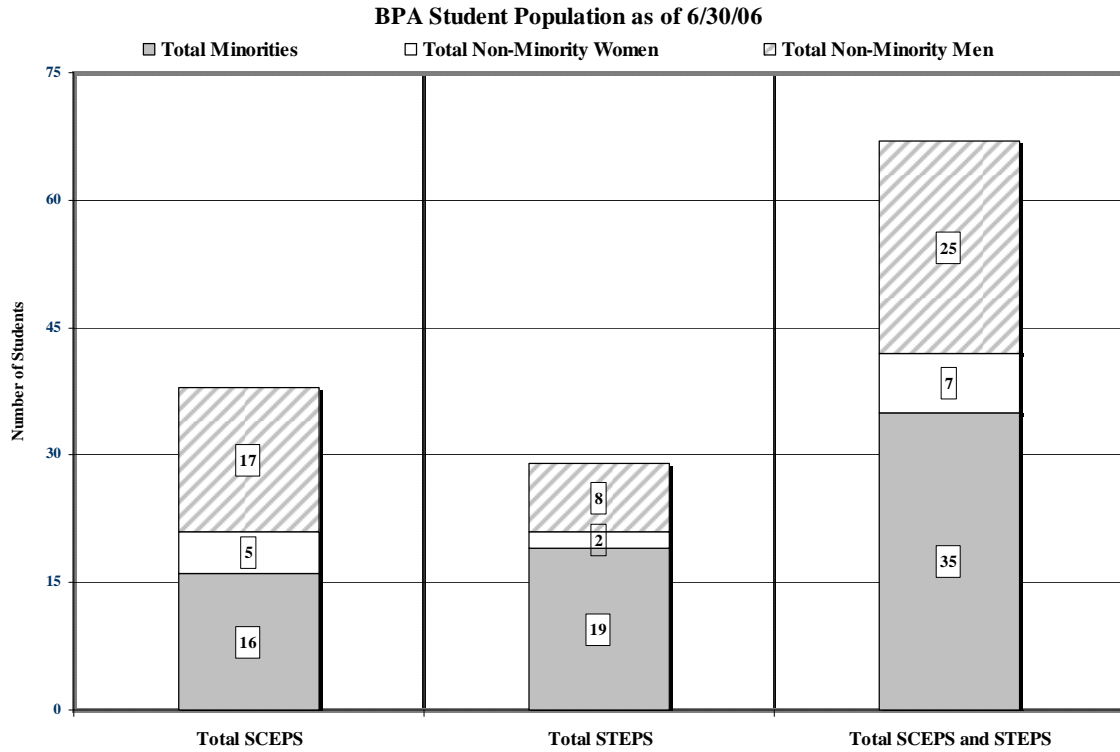
Average v. Median Age, By Occupational Series



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Appendix D: BPA Human Capital - Workforce Plan Priorities

Version 12, February 1, 2006

These agency-level critical skills list (based on prioritization input from VPs/Senior Managers reporting to the Front Office and percentage of employees eligible for retirement in each skill) is divided into three sections:

- **Priority 1:** The first risk-informed Human Capital - Workforce Plan, including treatments, due February, 2006 to focus FY06 HR resources. Skills not yet in SEDI become the first priority for SEDI in 2006 except where it is strategic to wait until relevant pending EPIP decisions are made.
- **Priority 2:** In FY06, focus for the year-end Human Capital - Workforce Plan update and priority 2 for SEDI.
- **Priority 3:** Focus for the FY07 Human Capital - Workforce Plan and SEDI. (Subject to change based on business strategy and EPIP outcomes, e.g., retraining needs.)

PRIORITY 1 – Focus for the FY06 Human Capital - Workforce Plan and SEDI

(VP designated priorities with 25% or more eligible for retirement within the next two years - through 12/07.)

#	Org Priority	Skill Sets/Occupations	% eligible for retirement	Series	No. of people	SEDI
CROSS-AGENCY BUSINESS COMPETENCY NEEDS / OCCUPATIONS						
	J, L, KE, T	Management and Leadership - Subsets include:		Various		
1		o SES/VPs (Executive Team members)	27% (4)		15	Done
2		o Mid-manager (other mgrs report to)	38% (21)		56	Done
3	TF	o Hourly Foreman/Chief Operator	40% (30)		75	FY 06
4	P	Power Contract Development, Negotiation & Administration (Yr 2 curriculum under development for FY06 for P)	20%* (22)	110,340,560, 830,1101,113 0, 1301	109	Done
	TM	Transmission Contract Development, Negotiation & Administration (CAE's and TMC Staff)	25% (12)	110, 301, 801, 850, 1101,1130	47	FY 06
5	P T	Public Policy Analysis	19%* (17) - P 25% (34) - T	Various	89 - P 135 - T	Done - P FY06 - T
SPECIALIZED WORK						
6	DK	Web/Communications (Internet/Intranet)	-----	New positions	2	N/A
7	PS	Power Revenue Analysts	44% (7)	1130	16	Done
8	TF	Lineman (Journey-level)	25% (17)	2810	69+	FY 06
9	TF	PSC Craftsman	30% (12)	2604	46	FY 06
10	TF	SPC Craftsman	26% (10)	3359	26	FY 06
CRITICAL SKILL SUBJECT MATTER EXPERTS (SME) LIST – Eligible to retire within two years						

*Included due to similar TBL contract development and policy analysis skill gaps.

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PRIORITY 2: Focus for Year End Human Capital - Workforce Plan and Priority 2 for SEDI in Fy06

(Less than 25% eligible for retirement through 12/07; initial treatment is to use SEDI to help inform risk analysis for the next WP.)

CROSS-AGENCY BUSINESS COMPETENCY NEEDS / OCCUPATIONS

1	J, L, KE, T	First level annual manager/supervisor	23%	Various	190	Done
---	-------------	---------------------------------------	-----	---------	-----	------

SPECIALIZED WORK

2	DB	Risk Management	0%	Varies	21	FY06
3	KE	Environmental Protection Specialist - NEPA Specialists (KEC)	19%	480, 28	21	FY07
4	KE	Pollution Prevention & Abatement Specialist (KEP,KEPR)	22%	28	9	FY07
5	KE	Fish & Wildlife Technology Specialist (KEWR)	37%	Various	8	FY07
6	KF	Accountants with business experience	14%	510	28	FY06
7	KF	Financial Info Systems Support (IT/Fin Mgmt)	16%	1160	32	FY06
8	TF	PSC Field Engineering	25%	850	42	FY07
9	TF	SPC Field Engineering	23%	855	29	FY07
10	TL	Contract Management Certification	13%	1102	48	FY06/07
11	TNC	Control, Protection, & Data Acquisition Eng	21%	850	24	FY07
12	TO	Network Planning, Modeling, & Control Eng (including Operation Planning Eng)	20%	850, 855	36	FY07

CRITICAL SKILL SUBJECT MATTER EXPERTS (SME) LIST – Not eligible to retire within two years

Note: This list is not static. Cross-agency additional job series with high retirement profiles will be reviewed for Human Capital - Workforce planning, but will not necessarily become immediate targets for SEDI in FY07.

PRIORITY 3 – Focus for FY07 Human Capital - Workforce Plan and SEDI

(Lower critical skills priorities, lower percentage eligible for retirement, and/or a cross-agency need without sufficient information to establish size of gap or retirement eligibility.)

CROSS-AGENCY BUSINESS COMPETENCY NEEDS / OCCUPATIONS

1	Agency	Risk Management		Varies	600?	TBD
---	--------	-----------------	--	--------	------	-----

SPECIALIZED WORK

2	KE	Remediation Compliance Specialist (KEP,KEPR)	11%	819, 1301	9	TBD
3	KE	F&W Project Manager/COTR (KEWL, KEWU)	0%	301	8	TBD
		KEWR – Policy Analyst (KEWR)	29%	various	17	TBD
4	LC	Power Rates Contracts Attorney		905	4	TBD
5	LC	F&W Endangered Species Act Attorneys	8.5%	905	1	TBD
6	LC	Transmission Contract Development Attorney	overall	905	1 of 8	TBD
7	PF	Power Rates Specialists	13%	110, 810, 830, 1130	13	Done
8	PF	Risk Modeling/Analysis	12%	1130,1101, 830	17	Done
9	PS	Power Marketing and Sales Specialist	18%	1101	17	Done
10	PS	Utility Industry Specialist	6%	1101, 1130	16	Done
11	PS	Power Contract Specialist	13%	1130	8	Done
12	PT	Transmission Ancillary Services (PTT)	18%	1130	11	Done
13		Substation Operators				TBD

ADDITIONAL CRITICAL SKILL SUBJECT MATTER EXPERTS (SME) SURFACED

Note: Building Effective Teams, Customer Focus and Intercultural Competence are additional PBL skill gap priorities identified for future years.

2007 BPA Risk Informed Human Capital - Workforce Plan

Appendix E: 2007 Workforce Plan Scope

Note: The list is in order of % *Eligible* to retire by 9/30/08

Series No	Series Title	% Eligible	% Projected	Employees in Series	Included in scope
503	Financial Clerical and Assistance	100%	0%	1	1
1083	Technical Writing and Editing	100%	100%	1	1
1152	Production Control	100%	0%	1	1
1350	Geology	100%	0%	1	1
2101	Transportation Specialist	100%	100%	1	1
4417	Offset Press Operating	100%	0%	2	2
341	Administrative Officer – to 201 series	67%	33%	3	3
5703	Motor Vehicle Operating	67%	67%	6	6
501	Financial Administration and Program	61%	35%	23	23
1712	Training Instruction	60%	0%	5	5
4607	Carpentry	60%	47%	15	15
5210	Rigging	60%	60%	5	5
401	General Biological Science	57%	21%	14	14
260	Equal Employment Opportunity	50%	50%	4	4
344	Management and Program Clerical and Assist	50%	0%	2	2
1084	Visual Information	50%	50%	4	4
1370	Cartography	50%	50%	2	2
1910	Quality Assurance	50%	0%	2	2
2050	Supply Cataloging	50%	0%	2	2
2130	Traffic Management	50%	0%	2	2
2150	Transportation Operations	50%	0%	2	2
2801	Misc. Electrical Installation and Maintenance	50%	50%	4	4
4102	Painting	50%	0%	2	2
4206	Plumbing	50%	50%	2	2
1601	General Facilities and Equipment	48%	25%	44	44
6907	Materials Handler	45%	32%	31	31
5803	Heavy Mobile Equipment Mechanic	43%	33%	30	30
1670	Equipment Specialist	43%	29%	7	7
809	Construction Control	42%	25%	12	12
2181	Aircraft Operation	42%	33%	12	12
480	General Fish and Wildlife Administration	40%	20%	5	5
3806	Sheet Metal Mechanic	40%	40%	5	5
4749	Maintenance Mechanic	39%	31%	13	13
482	Fishery Biology	38%	38%	8	8
2610	Electronic Integrated Systems Mechanic	36%	9%	11	11
340	Program Management	35%	16%	57	57
110	Economist (Just CSEs)	33%	11%	18	5
201	Human Resources Management	33%	22%	45	45
3414	Machining	33%	33%	3	3

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1170	Realty	32%	25%	28	28
1130	Public Utilities Specialist	29%	17%	284	284
301	Miscellaneous Admin & Program (Just CSEs)	27%	20%	122	1
850	Electrical Engineering	25%	15%	235	235
80	Security Administration (Just Security Officer)	25%	17%	12	1
2604	Electronics Mechanic (PSE Craftsman)	25%	21%	44	44
2810	High Voltage Electrician (Just linemen)	24%	17%	350	85
3369	Instrument Mechanic (SPC Craftsman)	23%	16%	43	43
2210	IT Computer Spec (Cyber Security Ofc)	22%	13%	243	1
1101	General Business and Industry (Just CSEs)	21%	13%	120	25
560	Budget Analysis (Just CSE)	20%	20%	5	1
5407	Electric Power Controlling (Just Chief Operators)	20%	14%	185	17
1301	General Physical Science (Just CSEs)	20%	17%	41	5
855	Electronics Engineering	18%	13%	67	67
1102	Contracting	17%	11%	46	46
28	Environmental Protection Specialist	15%	11%	27	27
510	Accounting	12%	3%	33	33
1160	Financial Analysis	9%	3%	34	34
486	Wildlife Biology	0%	0%	1	1

TOTAL

1372

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May be exempt from public release under FOIA
 (5 U.S.C. 552) **Exemption 6 - Personal Privacy**
 BPA review required before release

Marilyn Berti, HR Strategy, Policy & Planning

Appendix F: Risk Analysis Process

Existing Controls

The analysis of skill gap risks needed to determine the effectiveness of measures (controls) already in place to manage the risk for each skill area. The project team used controls identified in the 2006 Workforce Plan process. Data gathered from HRmis and subsequent manager and HR specialist interviews documented the level of use and effectiveness of the various controls to manage specific goals. HRmis data was also used to establish which skills were in areas of under representation

Interviews

HR analysts (in collaboration with Strategic Partners and HR SMEs) prepared for interviews with managers of the positions by gathering background information on each position/occupation on the list. An interview questionnaire was used with the managers to gather data to assist with determining the likelihood and consequence of separations within the critical occupations as well as possible treatments. The result was a list of factors affecting the level of risk for each skill area.

Skill Gap Risk Consequence, Likelihood, and Risk Map

A matrix was created to compute the consequence of a separation for each critical occupation or person by scoring the impacts of separation on business objectives, separation eligibility and projection, changing work group mission, and effectiveness of existing controls (recruitment/selection, staffing, training, and development). Various factors were considered:

- Factors with greatest impact are weighted higher.
- Strategic goals and objectives of those business units thought to have critical competency gaps
 - Assume/review current set of Agency strategic objectives
 - Review goals, objectives, and future direction of the organizations
 - Identify key products and services for the business unit
- Impact of separations on agency strategic objectives and the mission of the workgroup, and effectiveness of current controls are determined through interviews with BU managers and HR SME's.
- The work activities and functional requirements of those areas with critical competency gaps were determined.
- Future business unit staffing profile

Then each critical position was scored on the Likelihood Matrix. Scoring on the Likelihood Matrix was based on the percentage of the employees projected to leave within the next 2 years. Factors considered when scoring the likelihood included: probability of key person leaving, percentage of employees projected to separate (non-retirement and non-cause) in next 2 years, percentage of employees to change occupations (internal) in next 2 years, and current percentage of FERS employees (mobile employees).

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A Risk Map was created with consequence and likelihood scales in 5 columns and 5 rows with ranges corresponding to the Consequence and Likelihood Matrices. Each critical position was coded and placed onto the Risk Map in the column with the corresponding Consequence score range and the row with the projected Likelihood level taken from the Likelihood Matrix.

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Appendix G: 2007 Treatment Matrix

2007 Treatment Matrix

Plan #	Primary location in FY 06	Series #	Treatment key: Numerically prioritized top 1-3 treatments to reduce risk "X" = Other suitable treatments not identified as a priority C = Control already in full use * = EPIP in process or scheduled	Succession Planning								Recruitment				Training and Development							Engagement & Retention																	
				EPIP Process Improvement	Position Management	Succession plan (includes process documentation/SOPs)	FTE relief for knowledge transfer	Redeployment	VS/VERA	Term appointments	Career maps/paths	Contract out	Recruit internally	Recruit externally for diversity	STEP/SCEP Student Interns	Recruitment incentives	Relocation incentive	SEDI - skill gap analysis	Priority training	Knowledge transfer tools and consulting	Developmental rotations, cross-training programs	Technical Training Center	Executive Development	Leadership & Mgmt Development	Individual Development Plans	Mentoring-coaching	On-the-job training	Retention incentives	Reemployment annuities	Work place and time flexibility	Educate managers on retention tools available	Service Agreements	Performance Mgmt	Rewards & Recognition	Compensation					
OCCUPATIONS				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32					
Category 1 Priorities with Greatest Risk																																								
1	P	misc	Critical Skill Experts - Power			1	2						X	3	X	X	X	X		X							X	X							X	X				
2	TF	misc	Hourly Foreman/Chief Operator	*	X	1	3						X	X			X					2	X	X	X	X									X	X				
2	TF	2810	Linemen - Journey-level	*	X	2	1						X	1	X	X		X				1		X			X							X		X				
3	DB	1101	Risk Management Analyst			X			X		X	X	1	X	1	2	X																			X	3			
4	KE	28	Environmental Protection Specialist (NEPA) & CSEs		1	1	1							X	X			X		X	X				X	X	X	X								X				
2	TF	2604	PSC Craftsman	*	X*	2	1					X	X	X			X	X				1															X			
2	TF	3359	SPC Craftsman	*	X*	2	1					X	X	X			X	X				1															X			
5	KS	62	Customer Support Services & CSEs	1*	X*	1	1							X	X	X		X	2	X					X	X	X	3									X			
Category 2 Other Priorities Above the Risk Threshold																																								
6	DK	New	Communications Web Master											1		X	X	X																						
7	KF	510	Accountants & CSEs	*	X*	1	1						X	X	2	X	X	X		X	2					X	X	3		X							X	X		
8	TL	1102	Contract Management Specialists	1*	X*								X	X		X	X	2						X	X	X												X		
	BPA	SES	Senior Executive Service										X	X		X	X	3				1	2	1													X	3		
	BPA	340+	Managers		X*	1							X	X		X	X	2		3			1	1														X	2	
9	TN/TO/TP	850/855	Electronic and EE Engineering -Control, Protection, Data Acquisition, Network Planning, Modeling Engineering		1*	1	1							2	2	3	3	3	X		2	X				X	X									X	X			
10	TF	855	PSC Field Engineering	1*	1*								X	X	X	X	X	X		2	X																	X		
10	TF	850	SPC Field Engineering	1*	1*								X	X	X	X	X	X		X	X				X		X	3		X								X		
Category 3 Other Occupations above the Threshold																																								
11	TNSE	2801	Misc. Electrical Installation/Maint.			X	1						2					X																				X		
12	CH	201	Human Resource Specialist		X*	1	X	X	X				X	X			X	X		X					X	X												X		
13	CE	260	Equal Employment Opportunity	1*	X*	1						X					X																						X	
Priority Treatments:				✓		✓	✓						✓					✓		✓		✓	✓	✓				✓									✓	✓		

2007 BPA Risk Informed Human Capital - Workforce Plan

2007 Treatment Matrix (Priority)

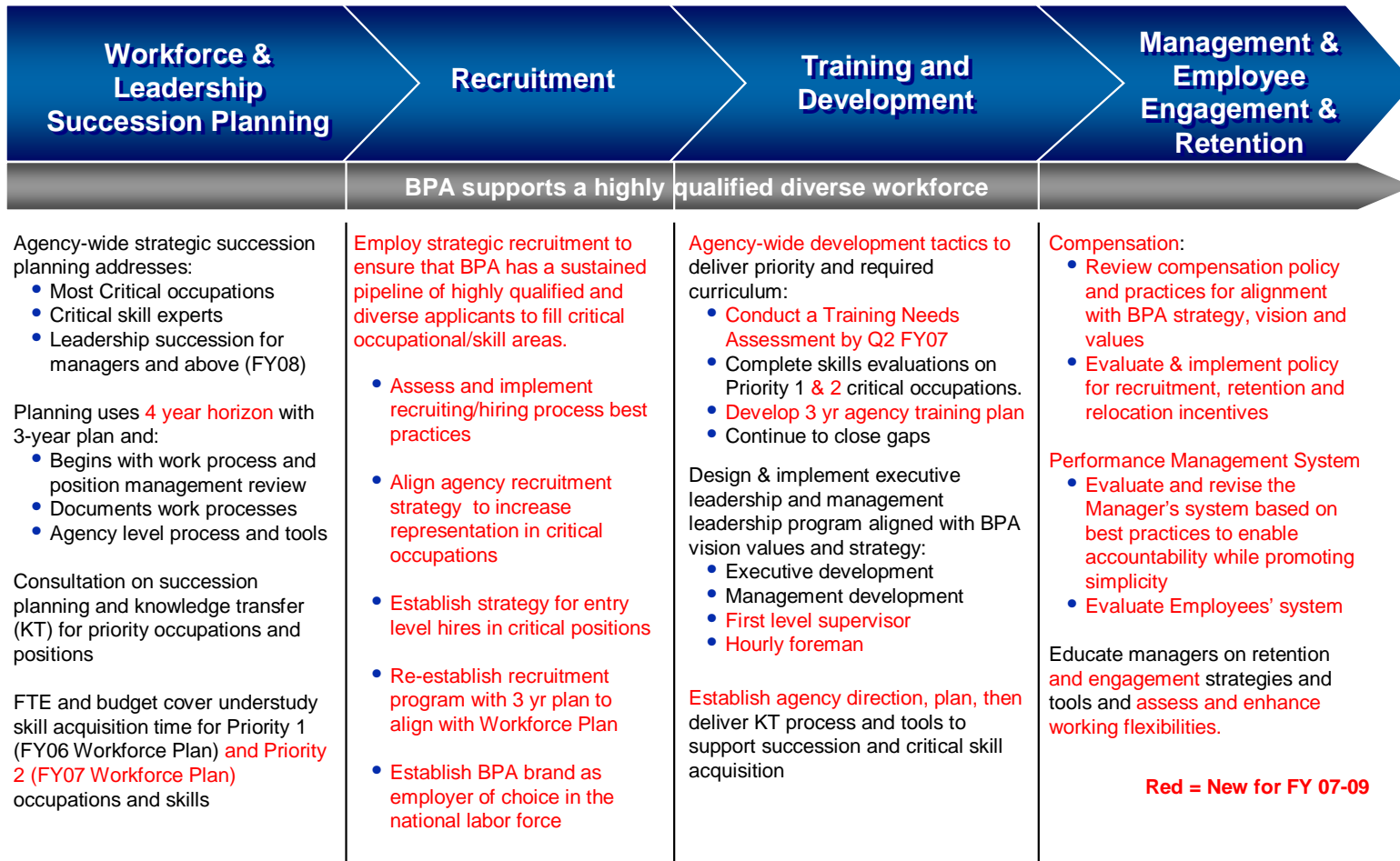
Plan #	Primary location in FY 06	Series #	Treatment key: Numerically prioritized top 1-3 treatments to reduce risk "X" = Other suitable treatments not identified as a priority C = Control already in full use * = EPIP in process or scheduled	Succession Plan			Recruitment							Training and Development							Engagement & Retention																				
				EPIP Process Improvement	Position Management	Succession plan (includes process documentation/SOPs)	FTE relief for knowledge transfer	Recruit internally	Recruit externally for diversity	STEP/SCEP Student Interns	Recruitment incentives	Relocation incentive	SEDI - skill gap analysis	Priority training	Knowledge transfer tools and consulting	Developmental rotations, cross-training programs	Technical Training Center	Executive Development	Leadership & Mgmt Development	Individual Development Plans	Mentoring- coaching	On-the-job training	Retention incentives	Work place and time flexibility	Educate managers on retention tools available	Service Agreements	Rewards & Recognition	Compensation													
OCCUPATIONS				1	2	3	4	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	27	28	29	31	32													
Category 1 Priorities with Greatest Risk																																									
1	P	misc	Critical Skill Experts - Power			1	2	X	3	X	X	X	X		X						X	X															X	X			
2	TF	misc	Hourly Foreman/Chief Operator	*	X	1	3	X	X				X					2	X	X	X	X															X				
2	TF	2810	Linemen - Journey-level	*	X	2	1	X	1	X	X		X								1															X	X				
3	DB	1101	Risk Management Analyst			X		X	1	X	1	2	X																								X	2			
4	KE	28	Environmental Protection Specialist (NEPA) & CSEs		1	1	1		X	X			X		X	X																					X				
2	TF	2604	PSC Craftsman	*	X*	2	1	X	X				X	X							1																	X			
2	TF	3359	SPC Craftsman	*	X*	2	1	X	X				X	X							1																	X			
5	KS	62	Customer Support Services & CSEs	1*	X*	1	1	X	X	X			X	2	X																							X			
Highest priority Treatment for Category :				✓	✓	✓	✓		✓	✓	✓	✓	✓	✓							✓		✓														✓	✓			
Category 2 Other Priorities Above the Risk Threshold																																									
6	DK	New	Communications Web Master						1			X	X	X																											
7	KF	510	Accountants & CSEs	*	X*	1	1	X	X	2	X	X	X		X	2						X	X															X	X		
8	TL	1102	Contract Management Specialists	1*	X*			X	X					X	2																								X		
	BPA	SES	Senior Executive Service			1		X	X					X		3					1	2	1															X	3		
	BPA	340+	Managers		X*	1		X	X		X		X		2	3						1	1															X	2		
9	TN/TO/TP	850/855	Electronic and EE Engineering -Control, Protection, Data Acquisition, Network Planning, Modeling Engineering		1*	1	1																															X	X		
10	TF	855	PSC Field Engineering	1*	1*			X	X	X	X	X	X		2	X																							X		
10	TF	850	SPC Field Engineering	1*	1*			X	X	X	X	X	X		X	X																							X		
Highest priority Treatment for Category :				✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Category 3 Other Occupations above the Threshold																																									
11	TNSE	2801	Misc. Electrical Installation/Maint.			X	1	2						X																									X		
12	CH	201	Human Resource Specialist		X*	1	X	X	X					X		X																								X	
13	CE	260	Equal Employment Opportunity	1*	X*	1								X																										X	
Highest priority Treatment for Category :				✓		✓	✓																																	✓	

Appendix H: Human Capital - Workforce Plan Strategies

BPA 2007-9 Workforce Plan Strategies

September 14, 2006

Goal: To assure that BPA has the right number of people with the right competencies in the right positions at the right time to successfully achieve BPA's business objectives today and in the future



2007 BPA Risk Informed Human Capital - Workforce Plan

APPENDIX I: SEDI STATUS UPDATE September, 2007

Group	SEDI Assessment	Skill Gaps	Treatment Plan	Status
BPA Managers /Supervisors	2005	Hiring and Staffing Managing & Measuring Work Motivating Others Customer Focus	Use Leadership Core Curriculum for 06 while creating new Leadership Development System for FY07	Planning and design in process
BPA SES	2005	Managing & Measuring Work Motivating Others Building Effective Teams Process Management, managing through systems? Conflict Management? Developing Direct Reports	Executive Development Plan – 06 <ul style="list-style-type: none"> • Create Leadership Model • 360 Feedback • Individual Development Plans • Coaching • Team Development plan 	Completed Completed In process Offered
CH	2005			Need to validate with service delivery model and address in FY 07
DB (CRO)	2006	Individualized	IDPs	
DK - CPAO	2005/06	TBD		In progress
J - CIO Computer specialists	2005/2006	Problem Solving Conflict management Customer Focus Building Effective teams Managing & Measuring Work (managers)	Select priority for FY 06 and deliver curriculum. Problem Solving identified as most critical for all of J. Conduct needs assessment to further define and curriculum development to follow in FY06.	Focused on Problem Solving and Communication skills. Launched Problem Solving Course in FY 06
KF - CFO	2005/2007-2009	TBD	Completed for 1160 and 510 positions	In process
PBL - All	2004/05	Public Policy Analysis (PPA) Contract Development and Administration (CDA) Negotiating Building Effective Teams I ntercultural Competence	Curriculum & work assignments (05) Curriculum development on identified gaps areas (06) Needs assessments completed and PBL Training Plan for FY06 in development Tie to Agency Diversity plan (FY06-FY11)	Began in 05 - 59 attended Curriculum development and delivery continues Contract Negotiations training offered in FY 06 Agency curriculum to support intercultural competence on hold for 07 Training needs assessment
TF: Hourly Foreman & Chief Oprs	2006-2007	Complete assessment in FY 07 pending completion of job profiles	Needs curriculum aligned with Agency leadership model	TF is using a contractor to do a more detailed skills analysis for these positions
TF Lineman	2006-2007			
TF PSC & SPC Crafts	2006-2007			
TL	2005/2007-2009	CO Certification	Course offerings scheduled	In process
TM/TMC	2006	On hold until 07 pending reorganization		

Appendix J: Training and Development Plan

Training Plan focus for FY 07-09:

Agency training must focus on required training and that needed to address the most critical workforce skill gaps.

The FY 06 Training Determination and Delivery Process Project established the repeatable process to identify and prioritize training needs and then develop, deliver and evaluate the training. The first step in that process, beginning in FY 07, is an annual agency level training needs assessment. The outcome will be the basis for a 2-3 year agency training plan.

Context for the Agency Training Needs Assessment:

Training needs resulting from the process improvement projects are not yet defined - Projects must be well into the implementation phase with clear roles and responsibilities articulated before specific skill gaps can be identified or for SEDI job profile development and self evaluations to be used.

SEDI skills gap analysis at the organization and workgroup level has surfaced some training needs however few of these are in the critical skills areas.

The training needs assessment data can provide us with a comprehensive list that can be prioritized, help us set the agency direction for training and resources can be leveraged to work on high priority agency training and meet strategic objectives.

The needs assessment process is a collaborative approach and dialogue with managers and business units to ensure that we use BPA training dollars efficiently and on the critical needs.

Updated FERC Standards of Conduct training may be required.

The 2006 Workforce plan identified specific training needs for which the training plan has been completed and the reorganization occurring on October 1 will take many targeted employees into new workgroups with new work processes. Skill gap assessments will need to be updated to identify new and remaining needs.

Hence, the 2007 Workforce plan recommends the following focus areas for the FY 07-09 training plan, pending completion of the Training Needs Assessment:

Required training - New

- Standards of Conduct training to support Marketing and Sales EPIP in addition to SOC required for the general BPA audience

Leadership and Management Development Curriculum for executives, managers and supervisors (includes hourly foremen)

New training needs - in order of priority given that limited resources will preclude addressing all of these needs.— specifics to be defined through the detailed training needs analysis:

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- Category 1
The new Customer Support Services (KS) function skill gaps (This analysis may surface corresponding training needs in the Marketing and Sales organizations of the Business units)
- Category 2 – if resources permit
Accountants – Finance Office – Priority critical skill gaps identified in SEDI analysis – Note gaps address financial analyst positions as well.
Contract Specialists - Supply Chain - dependent upon their EPIP and needs assessment process to identify specific competency and or skill-related training needs.
- Category 3 – if resources permit:
Series 201 HR Specialist priority skill gaps identified in SEDI analysis and the OPM HR Specialist gap analysis
- Competencies: those most critical to the focus areas listed above

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Appendix K: Agency-Level Implementation Plan

2007- 09 Agency Level Workforce Plan - Implementation Plan

Initiative	Outcome	Task/Milestone	Measurement Criteria	Responsible
WORKFORCE AND LEADERSHIP SUCCESSION PLANNING				
Deliver Executive Succession System and Process (Updated from FY 06 Plan)	Highly qualified and diverse internal candidate pool ready for executive (SES) and manager vacancies as they occur	FY06: Design system FY07: Establish talent pool program structure and process: Implementation plan and resources established by 11/30/06 Process tested with ECDP pool FY08: Implement ongoing process (Organization review mtgs, etc.)	FY06 Tasks on schedule FY07 Tasks on schedule FY08 Tasks on schedule & Quality and diversity of internal candidates for executive and manager positions meets selecting officials expectations	CHD - K Hunrick CHP, and CHR
Succession plan for Priority 1 and 2 critical skill occupations or position/expert identified in the Workforce Plan . (Updated from FY 06 plan)	FY07 and on: Replacement capability is achieved within the needed timeframe – the projected retirement date.	FY06: Provide succession plan guide and tools and consulting support to create specific succession plans for critical positions FY06: Position specific succession plans for Priority 1 critical experts are created and approved by 9/30/06 FY07: Position specific succession plans for Priority 2 critical experts are created and approved by 3/30/07	Tools and consulting available to meet need for critical positions FY06 plans due 9/30/06 and on schedule thereafter until completed FY07 plans due ____3/3/07? and on schedule thereafter until completed Plans address work process improvement, position management, process documentation, FTE needs and means of knowledge transfer.	Managers of positions CHD/CHP/CHR/CHE provides consultation on developing and implementing plans, depending upon the specific plan
Skill acquisition time is covered for Priority 1 and 2 occupations and positions (Re-write of Staffing Optimization initiative in FY 06)	Mission critical work has adequate staffing to assure workforce continuity and leadership succession Required knowledge transfer/skill acquisition time is resourced - has FTE to cover it	FY07: Succession plans identify FTE needs FTE is allocated to cover plans	Succession plans requiring FTE are so resourced	Managers of targeted occupations and positions

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RECRUITMENT				
Establish recruitment strategy to ensure that BPA has a sustained pipeline of highly qualified and diverse applicants to fill critical occupation/skill areas (Absorbs 2006 WP agency level treatments # 7 and 8)	Assess and implement recruit/hiring process best practices (including use of student programs)	Program review charter and plan approved by CHCO within 30 days of appointing project lead Review & recommendations completed according to the plan Accepted recommendations are resourced and implemented according to schedule days	tasks are on schedule Project measurements are met Recommendations have the support of key stakeholders	CHR, CHP, HRFTE - 6 months plus SME's Implementation phase - TBD
	Align agency strategy to increase representation in critical occupations	Program review charter and plan approved by CHCO within 30 days of appointing project lead Review & recommendations completed according to the plan Accepted recommendations are resourced and implemented according to schedule days	Plan is on schedule and has the support of key stakeholders	CHR plus HR community, Technical training, Civil Rights Office
	Re-establish recruitment program and 3-year Plan at level required to align with Workforce Plan	Program review charter and plan approved by CHCO within 30 days of appointing project lead Review & recommendations completed according to the plan Accepted recommendations are resourced and implemented within 60 days	Tasks are on schedule 60 days after implementation - Highly qualified diverse applicant pool for requested priority 1 and 2 critical positions as judged by selecting officials	CHR/CHE/CHP 1 HR FTE for 6 months plus SMEs Implementation phase - TBD
	Establish BPA as employer of choice through increasing BPA national awareness in the labor force	FY07: Plan to update BPA brand focused on critical occupations is approved by the CHCO by 11/30/06 Materials are in use in targeted markets within 60 days of plan approval	Tasks on schedule	CHR with DKC on tasks 1 and 3. Selecting officials/managers initiate recruitment requests

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TRAINING AND DEVELOPMENT				
<p>Deliver Priority Curriculum - using the Training Determination and Delivery process (Updated from FY 06) FY06: ---Public Policy Analysis ---PBL & TBL Contract Development, Negotiation & Administration ---Acquisition Contract Administration for COTRs by 9/30/06</p> <p>FY 07 : Focus on EPIP outcome training priorities for critical occupations and priority critical skills: --- Customer Support/Marketing and Sales process --- Contract development and administration --- Public Policy Analysis</p>	<p>Targeted skill gaps reduced.</p>	<p>FY07: Conduct agency level training needs assessment (TNA) by _____ FY07: Develop agency training plan (1-3 years) by: _____</p> <p>Continue to close gaps: FY07: Develop and offer curriculum for priority skill gaps _____ Implementation plan by _____</p>	<p>Plan Milestones are met. Plan accepted by the CHCO by _____</p>	<p>CHD - Alisa Yannello, with managers of occupations, SMEs</p>
	<p>Quality of work requiring targeted skills is noticeably improved and positively impacting business results as determined by key stakeholders of the work.</p>	<p>FY07: Complete skills evaluations on priority occupations to inform next training plan: SEDI FY 07 implementation plan by _____ Category 1 positions are in SEDI: with gap analysis: TF Lineman, Chief operators and Foreman positions by _____ _____ TM positions by _____. KS positions by _____. Category 2 positions are in SEDI with gap analysis: TN/TO/TP Power Electrical & Electronic Eng. specialties by _____ _____ Customer Support/Marketing and Sales by _____</p>	<p>Tasks are on schedule.</p>	<p>Managers of positions in partnership with CHD Alisa Yannello</p>
	<p>Critical occupation workforce skill gaps are identified and quantified to inform the agency training plan</p>			
<p>Design and implement executive leadership and management leadership program aligned with BPA vision, values and strategy (Updated from Align Management Development with Executive Development and Succession in 2006 WP)</p>	<p>'06: Management development is business driven, has clear measurable objectives, and has the support of senior management.</p>	<p>Design update is based on skill gaps. Research best practices by 6/30/06 Design system by 9/1/06 HRLT approval by 9/15/06 Proposal to sponsors by 9/30</p> <p>FY07: Approved proposal has implementation plan and resources within 30 days Plan includes risk treatments/addresses infrastructure to assure follow through, and is implemented</p> <p>Training is available by _____</p>	<p>Tasks on schedule</p> <p>FY08 Targeted management and leadership skill gaps are reduced.</p>	<p>CHD - Karl Hunrick (executive dev.) CHD - Bonita Clark (manager dev.)</p>
	<p>'07 Participants demonstrate knowledge/understanding of their roles, responsibilities/ accountabilities under new org & tools/resources available.</p>	<p>Foreman Preparation /Development Program</p>	<p>Complete needs assessment and develop learning objectives to test with HRLT and TF by _____ Design program and test with TF and HRLT by _____ Identify resources for implementation by _____ Complete implementation plan by _____ Implement as follows:</p>	<p>Tasks are on schedule</p>
<p>Knowledge Transfer (KT) Process (Updated from FY 06)</p>	<p>BPA has a cross agency approach, process, and tools accessible to support knowledge transfer and cross training for development, succession planning and knowledge management across BPA.</p>	<p>FY06: Provide KT guidance for priority critical skills</p> <p>FY07: Establish agency direction and plan for developing KT process by 5/30/06</p> <p>FY08: Begin to deliver process and tools</p>	<p>Guidance and tools available for critical skill succession planning beginning Fy 06 FY07: Plan tasks are on schedule</p>	<p>CHD - Alisa Yannello</p>

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MANAGEMENT & EMPLOYEE ENGAGEMENT & RETENTION

Compensation strategy (Incorporates use of retention tools from 2006 WP)	Develop compensation strategy that guides use of all compensation, including awards, recruitment, retention and engagement policy and tools	Project scope, plan and resources established by _____ Research completed by _____ Issues and options proposal to CHCO by _____ Executive discussion and conclusions by _____ Results communicated to target audiences within 30 days Lessons learned review to CHCO within 45 days	Tasks are on schedule	CHE/CHL/CHM
	Evaluate and implement policy for recruitment, retention and relocation incentives	Policy review by _____ Policy revision proposed by _____ Policy approved by CHCO by _____ New policy communication and change plan by _____ Policy published and communicated to target audiences by _____	Tasks on schedule	CHE/CHP/CHR
Performance Management System	Evaluate managers performance system based on best practices to enable accountability while promoting simplicity (Could use related survey scores to document outcome too.)	Scope project and ID resources by _____ Project plan approved by HRLT by _____ Data collection by _____ Analysis and recommendations to the HRLT by _____ Policy revisions to CHCO by _____ Communication and change plan by _____ Communication plan completed within 60 days Lessons Learned documented within 30 days	Tasks are on schedule	CHE/CHM/Audit/ DKC
	Evaluate employees' system based on best practices to enable accountability while promoting simplicity	FY08 and beyond		CHE
Educate Managers on retention and engagement strategies and tools and assess and implement new flexibilities.	Retention and engagement strategies and tools are available to sustain mission critical skills at BPA	Develop communications and implementation plan to educate managers about retention tools. Web update; assess training need.	Complete by 6/1/06.	CHP - CHM - Susan Riffel
		Approach approval	Complete by 7/30/06	HRLT
		Implement plan	Complete by 10/1/06.	CHP - CHM - Susan Riffel
		Add assess and implement new flexibilities as part of recurring WP Process	Annual review and status update	CHE/ CHM/CHP

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Appendix L: Implementation Communication Plan for 2007 Human Capital-Workforce Plan

Last revised 9/5/2006

Audience	Key Talking Points (what's new, time required, strategy link)	Initial Messages and Venue	Who Delivers	Date Due / Done	Follow Up/Updates
1) Executives (those having skill gaps or positions on the priority 1 and 2 lists)	What they need to do to: <ul style="list-style-type: none"> Address risk, Implement their Treatment Plan(s) How HR can help	Meetings E-mail	CH to ERMC and BOB CHE to specific VPs and managers	Once plan is accepted	Quarterly Risk and Treatment indicator progress updates
2) Mgrs of positions covered in the plan	How to implement their Treatment Plan How HR can help	Meetings E-mail	CHE/CHD w Strategic B Partners	Within two weeks of above date	Quarterly
3) Other Mgrs	SEDI 2007 (subset of #2) How to use SEDI to identify skill gap	Meetings SEDI Training	CHD/SEDI Team	October, 2006	According to SEDI plan
4) HR community & Resources HR EPIP team	What they need to do: <ul style="list-style-type: none"> Alignment on implementation of the treatments Support to management to obtain desired outcomes 	HRLT HR Meetings	CHCO/CHE	October, 2006	As needed
5) All VPs/ mgrs	General update and next steps	All Manager Meetings	CHCO/CHE	November 2006	TBD
6) BPA- Workforce	WP focus and strategy Where to find info on the plan	HR Update. Web site updates	CHCO/CHE CHE/DKC	November, 2006	As needed

Bill Zimmerman is our BPA Web link, Debra Smiley is our liaison with DKC

APPENDIX M: Recruitment Plan Focus

Recruitment Plan Focus for FY 07-09:

For external recruiting, the purpose is to secure highly qualified diverse applicants such that BPA can increase representation in these positions.

Targeted recruiting focus, based on the 2007-09 Workforce Plan:

FY 07: Category 1: Linemen

- Risk Management Analysts (business and credit/transaction risk)
- Energy Industry economist
- Critical Skill Expert positions in Power for which the succession plan calls for recruitment
- SPC & PSC Craftsman

Category 2: Communications Web Master

- Accountants and CSEs in Finance
- Contract Management Specialists
- Electronic and Electrical Engineers
- Security Officer /Manager
- Cyber Security Manager

FY 08/09: Continue with list above and add positions surfaced in succession planning word completed in FY 07 as well as:

- Electricians and Operators (based on the FY07-09 Hourly positions treatment plan)

APPENDIX N: Succession Plan Focus

BPA SUCCESSION PLANNING FOCUS FOR FY 07-09

The workforce planning process has surfaced a number of positions filled by individuals identified as critical skill experts with skills and knowledge which take years to acquire. Many are nearing retirement age without an understudy identified.

Succession Planning is therefore required to determine the best staffing approach and process are used to transfer knowledge and skills and assure workforce continuity in that skill area.

The focus for succession planning is as follows:

FY 07: (List is confidential and on a need-to- know basis)

Category 1:

- 15 Critical experts in Power (Initial plans, developed in FY 06, must now be implemented
- 4 Risk Management specialists (includes two supervisors)
- 7 Specialists in the new Customer Support Services organization (includes 1 Mgr)
- 3 Environmental Protection Specialists
- 2 Pollution Prevention Specialists
- 5 Fish & Wildlife Project Managers
- 5 EF& W Managers/Supervisors
- 1 Superfunds expert

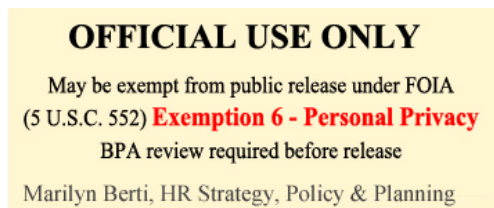
Total: 42

Category 2:

- 7 Accountants and Financial Analysts (Includes three managers/supervisors)
- 17 Electronic and Electrical Engineer Specialists
- 1 Manager – TBL Contracts expert
- 1 Security Officer
- 3 TBL Mid-manager

Total: 29

FY 08-09: To be determined based on an updated Workforce Plan



APPENDIX O: Lessons Learned from Workforce Planning

Lessons Learned from Workforce Planning: (as of 9/6/06)

All lessons are reflected in either this plan or in the scheduled repeatable workforce planning process design to be completed in FY 07.

Scope: The workforce plan needs to address supplemental labor (CFTE) as well to understand cross agency needs and opportunities.

Process:

- Use a four-year horizon for future plans to address the skill acquisition time needs for some critical skills and occupations – starts with the next plan
- Formalize a cross-functional workforce planning and execution team (not just HR) to ensure shared ownership and sustained sponsorship – to be built into the repeatable process design
- Develop treatment plans using balanced scorecard and key performance indicators (KPIs) format and language – beginning with this plan – occurs naturally as the WP targets become agency targets
- Focus limited resources in areas with the highest risks where they can have the greatest impact. We can't do it all but we need to be clear on priorities and the rationale behind them.
- Gain commitment to a shared understanding of and alignment around the WP process, implementation of treatments, and tracking progress across HR to substantiate positioning of HR resources – CHCO responsibility.
- Need access to regional and national compensation study for interviews and follow up with managers as well as developing any recruitment and retention packages.

Implementation:

- Sr VPs want to cover FTE for knowledge transfer and skill acquisition time within their FTE allocations rather than use an agency-level approach - canceling the Staffing Optimization strategy recommended in the 2006 plan. Tracking progress will surface any issues.
- Upfront monitoring alignment between EPIP initiatives and the WP treatment
- Need to link WP follow-through into VP performance contracts
- Need continuous visible WP reporting on critical skills progress and sponsor level issues

Communication:

Some managers did not hear enough about the implementation process.

HR must better communicate:

- The plan roles and responsibilities

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- Clear expectations for managers and HR for follow through on treatment plans
- How progress will be tracked quarterly
- What HR will do to support individual workforce plans
- What HR will not do that business units may initiate on their own and why
- What HR will not do now that business units need to wait on (not proceed on their own) and why

Again, integrating WP targets into agency targets will increase understanding and alignment around treatment plans to reduce risks.

Other:

OPM and DOE are requiring a Human Capital Plan – this Workforce Plan will meet this requirement.

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APPENDIX P: Glossary Definitions

	Term	Definitions	Source
1	Affirmative Employment	<p>Affirmative Employment: Required by Federal Laws, regulations, and Executive Orders , Affirmative Employment's purpose is to provide equal opportunity to individuals to apply and be considered for employment, promotion, and training opportunities. To identify and eliminate barriers and under-representation so that BPA's workforce reflects, maintains, and represents the gender, racial, and ethnic profile of relevant civilian labor pools at the regional and national levels.</p> <p>Affirmative Employment Program - mandated by law which includes self-analysis, problem identification, data collection, reporting systems, and elimination of any discrimination, past and present, tailored to achieve the Agency's specific diversity goals.</p>	<p>J Rush - CE</p> <p>Libby Herrera</p>
2	Career Ladder	The normal progression of a position from entry level to full performance.	
3	Career Map	A visual which identifies positions requiring similar competencies, to illustrates other career opportunities within the agency and used as a retention tool according to the Corporate Leadership Council.	
4	Career Path	Usually the direction - upward, but not often vertical, that suggests a "path" usually followed by all individuals in the course of reaching a certain grade level; the knowledge, skills, and competencies would lend themselves to support the movement in the "path." Often, career paths allow for skills/knowledge in one area to be transferred to another, thus the horizontal growth. (See Career Map.)	Godfrey Beckett, Civil Rights Division, BPA, May 2006
5	Critical Skill Expert/ Key Person	Anyone, either staff or management, who has such critical, irreplaceable skills (difficult to replace) that losing them could result in a serious risk to the Agency or business unit objectives—(a single point of failure).	MB
6	Cross Training	Training an employee to do different work which is generally related to the employee's current work. This different work may be in addition to regular assignments. Rotating tasks among members of a workgroup or function is done so that individuals can develop broader skills and perspective, back each other up, and increase individual effectiveness. This is also a way to further engage and motivate employees.	MB
7	Diversity	An organizational environment that is comprehensively open, supportive, and harassment-free, and that fosters inclusion and respect by welcoming new ideas and any person who can do the job, regardless of culture, lifestyle variations, race, gender, religion, sexual orientation, ethnicity, physical ability, other human similarities or differences to effectively accomplish the BPA mission with recognition that the Northwest community and workforce are becoming increasingly diverse. Diversity is not required by federal laws, regulations, or executive orders.	J Rush, CE

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	Term	Definitions	Source
		<p>Diversity is not required by federal laws, regulations or executive orders. Diversity is an organizational environment that is comprehensively open, supportive, and harassment-free, and that fosters inclusion and respect by welcoming new ideas and any person who can do the job, regardless of culture, lifestyle variations, race, gender, religion, sexual orientation, ethnicity, physical ability, other human similarities, or differences to effectively accomplish the BPA mission with recognition that the Northwest community and workforce are becoming increasingly diverse.</p> <p>Diversity is a management tool that provides an objective opportunity to reflect on policies, practices, and procedures to foster inclusion and respect for all individuals, regardless of their differences, so that the goals of the organization/Agency are achieved.</p>	<p>Godfrey Beckett, Civil Rights Division, BPA, May 2006</p> <p>Libby Herrera</p>
	Development Pool/ Succession Pool	Any group of individuals competitively selected and targeted for development in the expectations that they are upwardly mobile, and trainable/coachable—thus the agency invests in their upward growth and development; they are positioned and mentored/sponsored for future leadership.	
8	Feeder Pool	Any path that will allow movement into another area of occupation classification—i.e., we used the secretarial occupation as a feeder to Public Utilities Specialists (PUS) positions; more broadly—co-op programs are feeder pools usually within the same type of work.	Godfrey Beckett, Civil Rights Division, BPA, May 2006
9	Intern Pool	Employee in a developmental or career ladder position, usually a student or recent graduate who is acquiring on-the-job training along with formal coursework in preparation for or entry into a specific profession. A temporary intern may be converted to a permanent position without further competition.	MB
10	Internal Pool	Hiring students or recent graduates into a pool that rotates the employees through 3 to 4 jobs related to their field of study. A recent example is the Financial Analyst program.	2006 WP: "Treatment Definitions, Barriers and Solutions," pages 19-26
11	Job Profile	A list of competencies most critical to success in the job at the full performance level including the importance and proficiency rating of each.	
12	Key Person	See "critical skill expert."	
13	Knowledge Management	<p>A systematic approach to identify, document, organize, distribute, reuse, and modernize an organization's mission critical knowledge.</p> <p>While KM is a systematic approach, many KM practices and strategies can be implemented without establishing a formal KM program. The goal of KM is not to manage all knowledge, but to manage the knowledge that is most important to the organization. It involves getting the right information to the right people at the right time, and helping people create and share knowledge and act in ways that will measurably improve individual and organizational performance.</p>	<p>BPA website Knowledge Management</p> <p>Adapted from Learning to Fly, Collison and Parcel 2004.</p>

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	Term	Definitions	Source
14	Knowledge Transfer (used in cross training, details, internships, understudies, OJT, mentoring)	KT is about capturing, creating, distilling, sharing, and using know-how. That know-how includes explicit and tacit knowledge. Knowledge Transfer (KT) strategies are about how we can share, and transfer the explicit and tacit knowledge that is continuing to evolve by the people who apply this on a regular basis. KT strategies focus on those who know, versus creating knowledge repositories. KT strategies place the higher value on individual knowledge and finding ways to increase its transferability.	2006 WP: "Treatment Definitions, Barriers and Solutions," pages 19-26. Adapted from Learning to Fly, Collison and Parcel 2004.
15	Mission Related Training	Training that supports BPA goals by improving organizational performance at any appropriate level in BPA. It includes training that supports BPA's strategic plans and business objectives; improves an employee's current job performance; allows for expansion or enhancement of an employee's current job; enables an employee to perform needed or potentially needed duties outside their current job at the same level or responsibility; or meets organizational needs in response to human resource plans and re-engineering, downsizing, restructuring, and/or program changes.	
16	Pipeline	Any program that will allow entry into a career path or program to ultimately gain status; i.e., school outreach programs/initiatives and co-op programs; pipeline usually refers to careers that are mission critical and are needed for the future. Engineering, financial analysts, linesman, and operators are good examples.	Godfrey Beckett, Civil Rights Division, BPA, May 2006
17	Poaching/Raiding	Hiring away. Actively recruiting employees from other organizations (internal and external).	
18	Potential Promotee	An employee competitively selected to participate in a special development program designed to prepare one for promotion to a higher level position.	National Weather Service.
19	Rotational Assignment	A temporary transfer to new, generally related duties for a short time (3 to 12 months) to broaden the skills and experience of the person assigned. May also be called a cross-training assignment.	MB
19	Service Agreement	A written agreement between an employee selected for training (for more than a minimum period prescribed by the head of the agency) and the Federal Government in which the employee agrees that he will continue in the service of his agency after the training period ends for a period at least equal to three times the length of the training period unless he is involuntarily separated from the service of his agency. The service agreement also requires that the employee repay the Government the amount of additional expenses incurred by the Government in connection with his training if he voluntarily separates from the service of his agency before the end of the agreed to length of service period.	Title 5 CFR part 410, Sub part A, 410.101, Section 4108 of Title 5 USA code
20	Stakeholder	Any person or group which has a claim to or an investment in the actions and decisions of a company or government agency. Examples are voters, stockholders, bondholders, etc.	

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	Term	Definitions	Source
21	Strategic Plan	BPA's mission, general goals and objectives, the means and strategies to achieve goals and objectives (processes, skills, technologies, various resources), the relationship between performance goals in the performance plan and general goals and objectives in the strategic plan, the key factors that can affect achievement, the program evaluations to be used, and scheduled evaluations.	
22	Subject Mater Expert (SME)	An employee who possesses a thorough knowledge of the position knowledge and skill requirements, which may be evidenced by currently serving in, having held, or supervised the same or a similar position. An employee with deep and thorough knowledge of a professional or technical field.	Recently updated in PL 410-1?
	Subject Matter Expert (SME) option	A person whose up-to-date experience and knowledge exceeds that of the rest of the project team or organization. Frequently, the SME is an expert contractor or assigned by an organization to consult on a specific project or is a member of a Technology Advisory Board (TAB). SMEs know what is critical to the performance of the task and what is nice to know. SMEs typically have participated with standards bodies and/or have development or operations experience that dates back to the inception of their area of expertise that provides them with uncommon wisdom and patience.	Google Search (MZ)
23	Succession Planning	<p>Focuses on identification of key positions within an organization and potential candidates to fill those positions. It identifies the competencies and the skill sets associated with such positions to meet current and future organizational needs. If BPA experiences any shifts in focus and mission, key positions may change over time.</p> <p>Succession planning and position management is the process that helps ensure the stability of tenure of personnel. It is any effort designed to ensure the continued effective performance of an organization, division, department, or workgroup by making provision for the development, replacement, and strategic application of key people over time.</p>	BPA Succession Planning and management Guide, Prepared by Workforce Development (CHD) Version dated 6/29/06, Page 4 : William J. Rothwell, Effective Succession Planning, 2001
24	Succession Management	Focuses on creating and sustaining pools of well-qualified candidates with the skills to meet critical needs as they arise. Sound technical, scientific, and leadership skill sets are the primary focus of succession planning and management activities within BPA. Ensures a supply of talent for key positions. Capable people are ready to step in and perform to the needs of the position or job. It is a deliberate and systematic effort by an organization to ensure leadership continuity in key positions, retain and develop intellectual and knowledge capital for the future, and encourage individual advancement. Systematic succession planning occurs when an organization adapts specific procedures to ensure the identification, development, and long-term retention of talented individuals.	BPA Succession Planning and management Guide, Prepared by Workforce Development (CHD) Version dated 6/29/06, Page 4 : William J. Rothwell, Effective Succession Planning, 2001
25	Succession Pool/Development Pool	See Development Pool.	

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	Term	Definitions	Source
26	Training and Development	Training and Development are linked and can be differentiated in several ways. Training and Development strategies work hand-in-hand to invest in a talented workforce for BPA. Webster's definition of training: To instruct or condition to some manner of behavior or performance, to make proficient through special instruction and drill. Training can be defined as learning skills, knowledge, philosophies, models, etc. It is about learning "something" through attending classroom training, conferences, completing online learning, or WBT. Training can be seen as the foundational piece that sets the stage for higher learning and supports development at BPA. It is the stepping-stone toward the path of development. Development is defined as the application component of learning something new, or applying what you have learned back on the job. Development can take place through on-the-job training, cross-training, details, rotational assignments, special project work, stretch assignments, and aids in continuing education. Coaching, mentoring, and assessments are also ways to increase one's development through increased awareness, feedback, and application of this information toward development planning.	HR Training Determination and Delivery Process EPIP Process/A Yannello
27	Understudy	An employee competitively selected to acquire the knowledge or skills of a subject matter expert.	
28	Workforce	Federally employed BPA employees, which does not include contract employees.	
29	Workforce Plan	The workforce plan is a collaborative and iterative process to anticipate and treat workforce needs in support of the agency business direction. It uses the Australia/New Zealand risk management model to identify, analyze, prioritize, and treat workforce risks to the business strategy and provides focus and direction to HR strategy.	WP 1

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APPENDIX Q: Sample Treatment Plan

See attachment

APPENDIX R: Workforce Diversity Plan Focus

The Workforce Plan Diversity Focus provides a glide path for the Agency to incrementally move forward in our representation rates to meet America's demographic realities wherein minorities and women are becoming an increasing percentage of the labor force and are integral to the success of a business, agency, or organizational unit. It is through diligent management diversity decisions that Bonneville will be able to meet all its Agency Human Resource targets.

As the demographics change, it is up to management to make diversity an on-going consideration in all staffing decisions, remembering that diversity success occurs one selection at a time, one detail at a time, one training event at a time. Over the next decade competition for talented employees is expected to heat up, so now is the time to establish a BPA brand as a diversity friendly organization and to bring as many talented employees as we can in anticipation of our current and future mission needs,

Workforce Planning will succeed when it is intricately interconnected and aligned with other Agency Human Resource targets and goals. These targets are to mirror those in the Federal Equal Opportunity Recruitment Plan, the Disabled Veteran Administration Act Plan, the Human Capital Management Report, the BPA Diversity Plan, and the Equal Employment Opportunity Commission Status Report MD 715-01 Report. These plans impact the accomplishment of the Agency's targets and how we do business on a daily basis to improve the results we seek.

FY 07 Agency Target:

Nonminority female and minority students are selected and hired at target levels; 37-43% of the total students selected are women and/or minorities,
Nonminority female and minority selections and hire is maintained at target level, which is 17-23% of all hires are minorities and women
Separation ratio for all female and minority employees is maintained at target level - a hire/separation ratio of 1.0 to 1.2 is maintained

The FY07-09 Workforce Plan includes the following initiatives which directly support this target and Essential Program Elements:

1. **Workforce & Leadership Succession Planning:** Executive succession system and process to provide highly qualified and diverse internal candidate pool ready for executive and manager vacancies as they occur
 - o Establish structure and process by 2Qtr FY 07
 - o Implement by 4Qtr FY 07
2. **Recruitment:** Establish a recruitment strategy to ensure that BPA has a sustained pipeline of highly qualified and diverse applicants to fill critical occupations/skill areas:
 - o Assess and implement recruiting/hiring process best practices

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- Align agency recruitment strategy to increase representation in critical occupations
 - Establish strategy for entry level hires in critical positions
 - Re-establish recruitment program with 3 year plan to align with the Workforce Plan
3. **Training and Development:** Design and implement executive and management leadership development program aligned with BPA vision, values and strategy:
- Curriculum is to include Hiring and Staffing, Managing Diversity including Intercultural Competency and other critical leadership competencies at BPA.
 - Completed programs must strive for increased representation.
4. **Management and Employee Engagement and Retention:** Evaluate and revise the manager performance management system based on best practices to enable accountability while promoting simplicity through the employee performance evaluation system
- The evaluation will establish a baseline to track equal opportunity in awards and recognition for people with disabilities and other Underrepresented groups

During FY 07, the CHE organization will track and report progress quarterly against the targets listed above. These will also be reported in the annual MD 715-01 status report as well as the Human Capital Management report.

“The future does not just happen; we, by our own action or the lack of action, will invent and re-invent the future.” Unknown