

Investing in Our People: Building and Sustaining a UC Culture of Talent and Succession Management

Executive Summary

The University of California (UC) is one of the world's preeminent higher education institutions. To stay competitive and adapt to change, UC needs to attract and retain a talented and diverse workforce. UC faces a number of challenges on this front, stemming from social and demographic changes, California's economic landscape, and the responsibilities and limitations of a public institution.

Recent UC employee engagement survey results highlight room for improvement in employee retention and development, with responses indicating low satisfaction with career development opportunities and planning for management succession. Addressing these challenges through a strategic, integrated approach to talent and succession management was a key element of the 2015 Systemwide Human Resources Strategic Plan. Since then UC has taken a number of steps to realize that vision.

First, the UC Human Resources Leadership Collaborative drafted a 2018 position paper that delineated the business case for talent and succession management. In addition, UC licensed the Talent and Succession Planning Toolkit© (the Toolkit©), developed by human resources expert Doris Sims Spies of Talent Benchstrength Solutions. The Toolkit© provides a common set of tools and procedures available to all UC locations.

Today, UC is poised for a large-scale rollout of a talent and succession management strategy. Systemwide Human Resources recognizes that organizational structures and needs differ widely both across and within UC's many locations, and that talent and succession management programs will need to be tailored accordingly. With that in mind, the Northern California Cohort of the 2019 UC-Coro Systemwide Leadership Collaborative was charged with providing guidance on the broad implementation of talent and succession management practices that seek to:

- Match individuals' skills and experience to organizational needs to meet future business needs and identify potential career opportunities;
- Retain employees, utilizing individualized growth and development opportunities; and
- Develop a strong, diverse pool of internal applicants for key positions.

Approach

The Cohort developed and executed an eight-month project to assess UC's climate and readiness to implement a talent and succession management program and to prepare a "Quick Start Guide" to support managers and leaders at all levels who are interested in initiating a talent and succession management process.

The Cohort's assessment gathered information from more than 100 senior leaders across the UC system as well as 25 mid-level managers. A literature review of talent and succession management best practices in academia supplemented the interview data. The Cohort also reviewed the Toolkit© documents and, as a demonstration exercise, adapted several of them to the hypothesized needs and conditions of a particular campus, UCSF. In addition, the Cohort gathered case study information on new talent and succession management programs at the division level at two locations, UC Davis and UC Santa Cruz.

Findings

While many core ingredients for successful talent and succession management in higher education are similar to those in industry, some challenges are particular to the public university environment including a lack of alignment with institutional plans, difficulty sustaining planning processes through changes in top management, an open search culture,

and distinct workforce goals and employment policies.

The survey and interviews of senior leaders revealed broad support for talent and succession management, and were also a key motivator for the pilots. UC leaders are excited by the potential to offer more development opportunities to their staff, increase retention, sustain performance and more openly discuss career pathways and job opportunities. To realize this potential, they noted a number of challenges that need to be addressed, most notably the time, training and planning required for implementation as well as broader organizational constraints such as culture, organizational structures and incentives.

UC leadership is viewed as critical to sponsoring and promoting talent and succession management, with human resources departments serving as key partners, repositories of best practices and facilitators.

Quick Start Guide

The Cohort developed the Quick Start Guide (an 11-inch by 17-inch document) as a concise, practical summary of the core elements of talent and succession management, customized for the UC audience, with links to the relevant components of the Toolkit©. To inform the Quick Start Guide, the

Cohort drew on findings from senior leader and mid-level manager surveys and interviews, the literature review, the content of the Toolkit©, and UCOP documents on talent and succession management.

The Cohort recommends five key actions to begin to enact a talent and succession management process across UC:

1. **Encourage senior leadership to sponsor and champion talent and succession management** by adopting strategies tailored to each location's needs.
2. **Use the framework outlined in the Cohort-developed Quick Start Guide** to initiate talent and succession management processes.
3. **Customize Toolkit© materials and methods** to align with the goals, priorities, policies and practices of the particular UC location, and leverage it to support the implementation of talent and succession management initiatives.
4. **Invest in talent development programs**, establish and publish objective criteria for participation and communicate expectations.
5. **Build and sustain a culture** of inclusion, diversity and systemwide mobility to retain, further develop and fully benefit from UC's world-leading talent.

2019 UC-CORO NORTHERN COHORT	Elena Wen Jiang UC Berkeley	Kurt Schnier UC Merced	PROJECT SPONSORS The UC Human Resources Leadership Collaborative , which includes all location Chief Human Resources Officers and Systemwide Human Resources Leadership Ray Miskelley Executive Director of Contracts, Business and Finance, UC National Laboratories Nancy Pluzdrak Chief Human Resources Officer, UC Office of the President Donna Salvo Executive Director, Systemwide Talent Management, UC Systemwide Human Resources
Branden Brough Berkeley Lab	Valerie Leppert UC Merced	Emily Schwarz UC Berkeley	
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