

Talent and Succession Management at the University of California

A Quick Start Guide: Three Steps You and Your Team Can Take

1 Assess *Identify your future talent needs*

Assess your team's current state and set a strategic vision.

- What's on the horizon? How is the organization changing? How is technology changing?
- What's going away?
- What capabilities are likely to be required?

Identify upcoming position changes and needs (including for your own position).

- Which positions are critically important?
- What are your likely personnel changes?
- Incorporate diversity goals.

Identify key knowledge and skills your team has now, and will need in the future.

Think broadly, including skills such as:

- Developing partnerships
- Leading diverse teams
- Implementing new programs
- Navigating conflict

Work with HR, stakeholders and other experts to prioritize critical and difficult-to-fill roles.

- Share information with HR and other managers about employees whose skills and experience may align with roles in other departments or UC locations.

Resources in the Toolkit:

- Talent Culture Questionnaire
- Leadership Position Needs Assessment

2 Communicate *Share vision and tools*

Identify or build talent development programs and strategies, including:

- Internships
- Mentoring, informational interviews, job shadowing, mobility fairs
- Leadership opportunities

Train managers to prepare for talent and succession management conversations.

- Dedicate time for staff self-assessments to focus on strengths, interests and areas of opportunity.

Meet with staff to understand career goals and skills needed for future roles.

- Design and implement individualized development plans to build skills for key positions.

Explain how talent and succession management differs from performance.

← **Performance management** looks back at the employee's recent work and sets near-term goals.

→ **Talent and succession management** looks to the future, with a focus on organizational needs and long-term employee development.

Resources in the Toolkit:

- Employee Career Discussion Sheet
- Talent Review-Succession Meeting Preparation Checklist
- Ability and Aspiration Form

3 Measure *Track and analyze progress*

Develop and track metrics, such as:

- Staff retention and employee engagement
- Number and diversity of qualified internal applicants for key positions
- Time to fill vacancies
- Diversity of leadership
- Training opportunities created or utilized by staff

Metrics may vary and should be aligned with department and university objectives.

Track results; report successes and opportunities for improvement

- Highlight quick wins, staff mobility and achievement of individual career goals.
- Recognize managers who invest in talent and succession management.
- Reinforce best practices for building a diverse workforce.

Resources in the Toolkit:

- Succession Plan Form

Implementation Recommendations

- Engage trained talent and succession management facilitators to support consistent implementation across the department or organization.
- Coordinate with HR; diversity, equity and inclusion; and legal offices to ensure compliance with laws and policies.
- Identify champions and sponsors at all levels.
- Plan sufficient time and organizational resources for implementation.
- Communicate clear goals and values.
- Support cross-departmental and cross-institutional talent development.
- Continuously assess processes to reduce biases.

To fulfill its teaching, research and public service mission in the coming years, UC needs to attract, develop and retain top talent at all levels.

Talent and succession management can:

- 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.
- Develop a strong, diverse pool of internal applicants for key positions.

Everyone has a role

Senior leaders

- Develop and communicate strategic vision.
- Provide institutional support.

Hiring managers

- Assess skill needs.
- Identify critical positions.
- Provide opportunities for growth and development.

All employees

- Engage in this process.
- Take responsibility for career growth.
- Provide feedback.



Tools to Help

UC has licensed a toolkit to support talent and succession management programs. This icon points you to specific resources in the toolkit, which are available here: <https://uccoronc2019project.ucop.edu/>