

Talent Development Culture Questionnaire

#	Statement	Write a statement here that more accurately matches your organization's talent culture.	Describe any action or changes you will make to current practices and policies to enhance the talent culture.
1	Managers are responsible for enabling employee growth and development.		
2	Employees are responsible for taking ownership of their career development and growth.		
3	We take active steps to increase the diversity of our leadership team through talent development and succession management.		
4	We use 360 feedback only for developmental purposes and not for performance appraisals.		
5	We enable each employee's growth and career development.		
6	All employees (including leaders) engage in performance check-in conversations and developmental coaching conversations regardless of career stage, background or position.		
7	All employees are aware of our talent and succession management strategy.		
8	Positive, constructive and actionable feedback is shared openly throughout the organization.		

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9	Our organization has a policy affirming that employees have a protected number of days to be used for professional development annually.		
10	Our job descriptions are written to include “continuing professional development” as part of every job.		
11	All employees have personalized development plans and professional development goals as part of our performance evaluation program.		
12	Our job announcements contain a “We are a Learning Organization, here’s how and why” statement.		
13	Everyone can articulate our organization’s mission, vision, values and goals.		
14	Our leaders connect employees and support cross team and cross functional work.		
15	We create space for learning and practicing new strategies to enhance work and support continuous improvement.		
16	Employees on every team know that they can bring forward creative ideas, as well as better and new ways of working.		
17	Our organization is equitable and diverse; marginalized communities are represented, included and appropriately recognized in spaces of thought partnership, collaboration and decision-making.		

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18	Our team is ready to respond quickly to new challenges.		
19	Our organization takes calculated risks; employees understand how to work and lead by careful estimation of probable outcomes and plan with forethought.		
20	Employees report that they can appropriately balance effectively doing their jobs and spending meaningful time on job and career growth activities.		
21	Above all else, the health and wellness of the members of our organization comes first.		

Now what?

What were the themes that you have gathered from this discussion?

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What are the top mindsets to address? What are the high priority actions?

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What will be most helpful to further enable growth and development?

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What are the barriers? Workarounds? Creative ideas to push through?

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Talent Development Needs Questionnaire			
How do you envision the organization, teams and the work changing in the next 1-3 years?			
Organization:			
Teams:			
The work:			
What roles are critically important, why? What are the current skill sets and strengths?			
Role:	Why important?	Current skill sets:	Strengths:
Which three competencies are most critical for development?			
For everyone: UC Systemwide Core Competency ABCs		For leaders, managers and team leads, Berkeley People Management competencies	
A:		1:	
B:		2:	
C:		3:	

Departmental Needs Assessment
Future unit, organization and global trends
How is our department evolving compared to other units, the organization and against global trends?
Examples: increased automation, resiliency planning, DEIB-focused workplace...
What’s our strategic focus?
2-3 areas that our workforce should focus on to strengthen the most critical elements of future strategic success (widest net possible, intentional maximum impact)
Examples: higher retention, enhanced belonging, new revenue streams, resilient teams, continuous reskilling/upskilling...
What are our opportunities for growth?
Consider growth of the team, growth of the impact of the work you are performing, growth in terms of employee wellness, etc.
Examples: increase coaching at all levels, incorporation and upholding of portions of the week blocked for “no meetings” to build space for personal and professional relationships to grow...

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Upcoming Organizational Changes:	Current Staff/Workforce Capabilities:	Workforce Capabilities Needed to Address Changes:	Action Steps to Address Changes:
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.
4.	4.	4.	4.
5.	5.	5.	5.

Now what?

What do we need to ask our team about the future?

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-
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How will we incorporate what we learn (the team’s voice)?

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-
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Leadership Needs Assessment				
Position Title and Incumbent Leader	Date Position is Expected to Open	Category	Potential Candidates	Status / Action Plans / Needs
		☐ Current ☐ High Risk ☐ Retirement ☐ New	Internal: External:	
		☐ Current ☐ High Risk ☐ Retirement ☐ New	Internal: External:	
		☐ Current ☐ High Risk ☐ Retirement ☐ New	Internal: External:	
		☐ Current ☐ High Risk ☐ Retirement ☐ New	Internal: External:	
		☐ Current ☐ High Risk ☐ Retirement ☐ New	Internal: External:	
		☐ Current ☐ High Risk	Internal:	

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		☐ Retirement ☐ New	External:	
		☐ Current ☐ High Risk ☐ Retirement ☐ New	Internal: External:	
		☐ Current ☐ High Risk ☐ Retirement ☐ New	Internal: External:	
		☐ Current ☐ High Risk ☐ Retirement ☐ New	Internal: External:	
		☐ Current ☐ High Risk ☐ Retirement ☐ New	Internal: External:	

CURRENT: All leadership positions that are currently vacant in your organization	HIGH RISK: All leaders who are viewed as a high vacancy risk in the coming year
RETIREMENT: Any leadership position currently filled by an incumbent who has <u>declared</u> an intention of retirement	NEW: Any new / future leadership positions you might create in the coming year to address organizational growth or to lead new initiatives, new business units, new growth areas, etc.

Stage 1 Summary: Assess Future Needs

Discover - What are we understanding?

From the discovery thus far, what is clear for planning and action?

What do we understand are the top priorities?

What's not clear? What needs further discovery and exploration?

Explore - What are the options to move forward?

What are the first steps we need to take?

Which people need to be in the room for strategy conversations, planning and work? From leadership? Which people managers? Emerging leaders? Facilitators? HR support?

What is the role of leadership in seeing the plan through to success?

How will we engage the team in developing and building consensus around the plan?

What do we know needs to happen to bring the plan to fruition?

Plan - Key timeline actions	
What key actions are needed to engage the workforce in this process?	
What key metrics will we use to measure our success?	
How will we track and analyze progress?	
What's the communication approach (reporting successes, updates, buy-in)?	
What's the timeline?	
Act - Enable success by diving deeper to support accountability of the plan in stages 2 and 3	
What are our measures of accountability?	
What will we do to support managers? Individual contributors?	
How will we onboard new team members?	
How will we account for, respond to and shift when priorities change along the way?	
How will we recognize and address bias throughout all of the plan's stages?	
Continue to Stage 2: Develop Top-Level Plan	

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Leadership Succession Planning Form						
Name of Leader	Title	Emergency Plan	Currently Qualified Successors	Development to Strengthen Readiness of Qualified Successor	Future Successor(s)	Development Opportunities for Future Successor(s)

Engagement Plan

Considerations	Notes
Communicate what you learned and developed in Stage 1	
In sharing what you learned and developed in Stage 1, invite supportive and actionable feedback	
Create “Echo Kits” that enable the same message to be shared by many different individuals	
Communicate your plans widely using your leaders, in town halls, in 1:1 conversations and in Roadshows within units Some key points to cover: 1. The case for change - Why are we doing this work? 2. The project scope - What is the scope of the work moving forward? 3. Inclusivity - How will all voices be incorporated in the planning and implementation? 4. Project and plan timeline – What can be expected? When?	
Enable, empower and track that all managers share the message with the individuals on their teams	
Enable collaboration and cross-functional strategy work	
Create space for conversations with stakeholders and other external partners	
Reinforce best practices for building an inclusive, diverse and equitable workforce where everyone feels heard and like they belong	

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Recognize and celebrate managers who are leaders in talent and succession management	
Recognize and celebrate staff career mobility	
Recognize and celebrate achievement of individual career goals	
Other	
Other	
Other	
Continue to Stage 3: Develop Next-Level Plan	

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Facilitate Development Planning Conversations			
Step 1	How	By When	Tools Needed
Leadership sets the expectation	-Policies -Messaging		-Webpages -Echo Kits
Manager prepare for the conversation	-Coaching Skill Dev -Stay Interviews		-Check lists -Toolkits
Employees complete a professional development plan	-Templates -Training		-PD Workbook
Step 2	How	By When	Tools Needed
Leadership set and hold accountability	-Evaluation -Reporting		-Dashboards
Managers meet with each employee to talk about their PD plan	-1:1 meetings		-1:1 Meeting Agenda (ATD's Managing Down Meeting Prep Questionnaire)
Employees incorporate regular PD conversation	-1:1 meeting -Performance convos		-1:1 Meeting Agenda (Managing Up Resources) -Performance Conversation Training
Step 3	How	By When	Tools Needed
Leadership convenes groups to explore and support all employee development against the priorities of the succession plan	-Naming champions -Protecting time -Requiring accountability		-Pulse surveys -Focus groups -Dashboards -Reports

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Based on the succession plan priorities, managers confirm short-term and long-term priorities and goals with employees	-1:1 conversations -Team meetings -Retreats		-Check lists -Resource kits -Retreat planning help
Employees report on progress, road blocks and new opportunities that arise	-1:1 conversations -Anonymous and attributed feedback		-1:1 Meeting Agenda (Managing Up Resources) -Surveys
Step 4	How	By When	Tools Needed
Leadership participates in networks, provides support and shares resources for all	-Being visible -Walking the talk		-Check lists -Accountability partners
Managers encourage participation in networks, provide support and share resources for all	-Championing the effort -Protecting the time -Asking the questions		-Check lists -Accountability partners
Employees leverage networks, support and resources that they need to be successful	-Engaging -Speaking up -Owning their career		-Check lists -Accountability partners

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Important Client Groups Supported by L&D Initiatives	
SE – Senior Executive	EXEC – Business Unit Leader / Executive
MoM – Manager of Managers	FLL – First Level Leader or Supervisor
SR IC – Senior Level Individual Contributor	EL IC – Entry Level Individual Contributor
All – All organizational levels	

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Incorporate Talent Development Initiatives		
YOU	ME	WE
Learning from the organization	Self-directed learning	Learning with others
Programmatic Initiatives - Professional and career development workshops, seminars, courses, conferences - Executive development workshops - Fellowship or internship opportunities - Mentorship programs - Performance evaluation / management programs - Compliance training - Competency models - Needs assessments - Organization development - Workforce planning - Performance consulting - Succession planning - Change management - Recognition and rewards Support Initiatives - Managing learning programs - Training delivery - Compliance tracking - Evaluating learning impact - Compensation and benefits - Instructional design - Talent acquisition - Recruitment - -	Programmatic Initiatives - Self-Assessments - Formal E-Learning Pathways - Executive / leadership development guides and toolkits - Learning Libraries - Performance improvement resource libraries - Individual Development Planning Guides Support Initiatives - Policies - Talent mobility enablers - Learning resources (Ex: LinkedIn Learning, LMS, trade association resources) - - - - - - -	Programmatic Initiatives - Peer Coaching - Dialogue guides - Book Clubs - Sponsoring networks - Advocacy networks - Informal job shadowing - Leadership development thinktanks / Mastermind Groups - Onboarding networks - Organizational effectiveness groups - Networking events - Professional associations, communities of practice, affinity groups - Talent engagement groups Support Initiatives - Empowering diversity, equity, inclusion, and belonging - Sponsorship - Advocating - Fostering collaboration - Fostering innovation / continuous improvement - - - - -

Step 1 - Prioritize		
In reviewing what you know so far, what are your business priorities?		
Business priorities	Is this priority: Mission Critical, Important, or Nice-to-have?	Notes
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		

Step 2a - Build & Populate

In partnership with your leadership, review the priorities above and assign talent development initiatives aligned in support of each. On this worksheet, work through your mission critical priorities, meaning they will have the biggest, positive impact on the business.

You can list multiple components for each priority.

Business Priorities ("Mission Critical" from above)	Talent Development Initiative(s) w/ Biggest Impact on this Priority	Rational (Why?)

Step 2b - Build & Populate

Next, do the same for your important priorities.

Business Priorities ("Important" from above)	Talent Development Initiative(s) w/ Biggest Impact on this Priority	Rational (Why?)

Step 3 - Launch

Now, build out your plan for bringing your initiatives to life. Ensure you have a variety of You, Me, and We approaches as part of your strategy. Define who you are targeting with each initiative. Define your budget and non-monetary resources. Then, assign an accountability person and timeline for launch to each.

Talent Development Initiative (from above)	Client	Learning Type	Budget / Resources	Accountability (Person)	Launch (Date)
	☐ S Exec ☐ Exec ☐ MoM ☐ FFL ☐ SL IC ☐ EL IC ☐ All	☐ You ☐ Me ☐ We			
	☐ S Exec ☐ Exec ☐ MoM ☐ FFL ☐ SL IC ☐ EL IC ☐ All	☐ You ☐ Me ☐ We			
	☐ S Exec ☐ Exec ☐ MoM ☐ FFL ☐ SL IC ☐ EL IC ☐ All	☐ You ☐ Me ☐ We			
	☐ S Exec ☐ Exec ☐ MoM ☐ FFL	☐ You ☐ Me ☐ We			

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	☐ SL IC ☐ EL IC ☐ All				
	☐ S Exec ☐ Exec ☐ MoM ☐ FFL ☐ SL IC ☐ EL IC ☐ All	☐ You ☐ Me ☐ We			
	☐ S Exec ☐ Exec ☐ MoM ☐ FFL ☐ SL IC ☐ EL IC ☐ All	☐ You ☐ Me ☐ We			
	☐ S Exec ☐ Exec ☐ MoM ☐ FFL ☐ SL IC ☐ EL IC ☐ All	☐ You ☐ Me ☐ We			
	☐ S Exec ☐ Exec ☐ MoM ☐ FFL ☐ SL IC ☐ EL IC ☐ All	☐ You ☐ Me ☐ We			

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Engagement Plan	
Considerations	Notes
Do you have the right TD initiatives to support the Business Priorities?	
Do your TD initiatives support growth for all client groups in your organization?	
Do you have a strong mix of You-Me-We Leaning for each initiative? For each client group?	
How will each employee own their development?	
How will managers and the organization support and enable growth opportunities against the priorities outlined in the succession plan?	
Based on employee reflections and reporting from managers to the succession planning committee and unit leadership, what are the key talent development initiatives required to meet future workforce needs?	
Other	
Other	
Other	
Continue to Stage 4: Measure, Revisit, Refine	

Measure, Revisit, Refine

Metrics to Consider

High Performing Individuals and Teams

Individuals (Execs, Managers, ICs) with top performance levels / numeric ratings through your performance program

Individuals (Execs, Managers, ICs) with top performance levels / numeric ratings from feedback from their team members

Teams with high percentages of Stand Out or Superior performance

Teams with high percentages of awards, recognitions, etc.

Individual career mobility and growth (promotions, role expansions, lateral moves, upward moves)

Participation in L&D

Numbers participating in L&D

Success of L&D initiatives (behavior change after the session)

Managerial support for participation in L&D efforts

Time available for / time spent on L&D participation

Budget available for L&D participation

Number of employees with: Individualized Development Plans / "Continuing Prof Dev" as part of their job description

Diversity, Equity, Inclusion and Belonging

Number and diversity of qualified internal candidates for key positions

Diversity of leadership

Diversity of teams

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Participation in employee resource groups (identity-based orgs, communities of practice, etc.)	
Participation in organization-sponsored community building events	
Number / percentage of roles with structural barriers for growth	
Recruiting, Turnover and Retention	
Internal hires vs. external hires	
Voluntary turnover rates	
Number / percentage of roles with high voluntary turnover	
Role tenure (how long people stay in a role)	
Number of roles posted with “We are a learning org” language	
Where roles are posted	
Satisfaction (conduct engagement pulse surveys on a regular basis to keep track of):	
My manager cares about: me as an individual / my career growth / my career success	
The organization supports and enables my growth and development	
I trust: my direct supervisor / my team / my department head / our organization’s leadership team / our CEO	
I feel that I have strong, collaborative relationships with: my direct supervisor / my team / across the organization	
Within my team, my opinion seems to count	
Within my team, I feel that my personal contributions are recognized by my supervisor	
Regardless of my background, I have an equal opportunity to succeed at this organization	
I am interested in: continuing my career with this organization / growing my role at this organization	
I would recommend this as a great place to work	

Starter Succession Plan Assessment Prompts
What’s been working? What’s clear to us?
What needs re-exploration and re-planning?
Where are there inequities in the succession plan? What do we do to address?
SWOT (Strengths, Weaknesses, Opportunities, Threats) / SOAR (Strengths, Opportunities, Aspirations, Results)
Other?