



Department of

Human Resources

Workforce Planning and Succession Planning

Challenges

- What are the challenges your agency currently, or soon will face, in acquiring the right talent?
- What are your agency's hard-to-fill positions? Why are they hard to fill?
- What positions in your agency, if vacated today, would hinder the agency from effectively and efficiently achieving its mission?

The Urgency for Talent Management in the Public Sector

This dynamic global business environment is at the root of an unprecedented set of talent challenges.

Workforce Challenges	Talent Management Challenges
Shrinking Workforce	<ul style="list-style-type: none">• Heightened competition for talent
Aging Workforce	<ul style="list-style-type: none">• Loss of experience and intellectual property• Leadership gaps
Globalization	<ul style="list-style-type: none">• Mobile and diverse workforce
War for Talent	<ul style="list-style-type: none">• Skills shortages in key roles
Low Employee Engagement	<ul style="list-style-type: none">• High turnover• Poor performance
Attracting and Retaining Generations X & Y	<ul style="list-style-type: none">• New recruiting/sourcing techniques• Focus on employment brand• New techniques for employee engagement and motivation

Definition of Talent Management

Talent management drives agency results when leaders use the right data to align business and people strategies.

Ten Talent Management Practices

i4CP Research Indicated Ten Practices = Talent Management
(is Talent Management a Movement?, T&D Magazine)

- 1. Career planning**
- 2. Competency management**
- 3. High-potential employee development**
- 4. Leadership development**
- 5. Learning and development**
- 6. Performance management**
- 7. Professional development**
- 8. Recruitment**
- 9. Retention**
- 10. Succession planning**

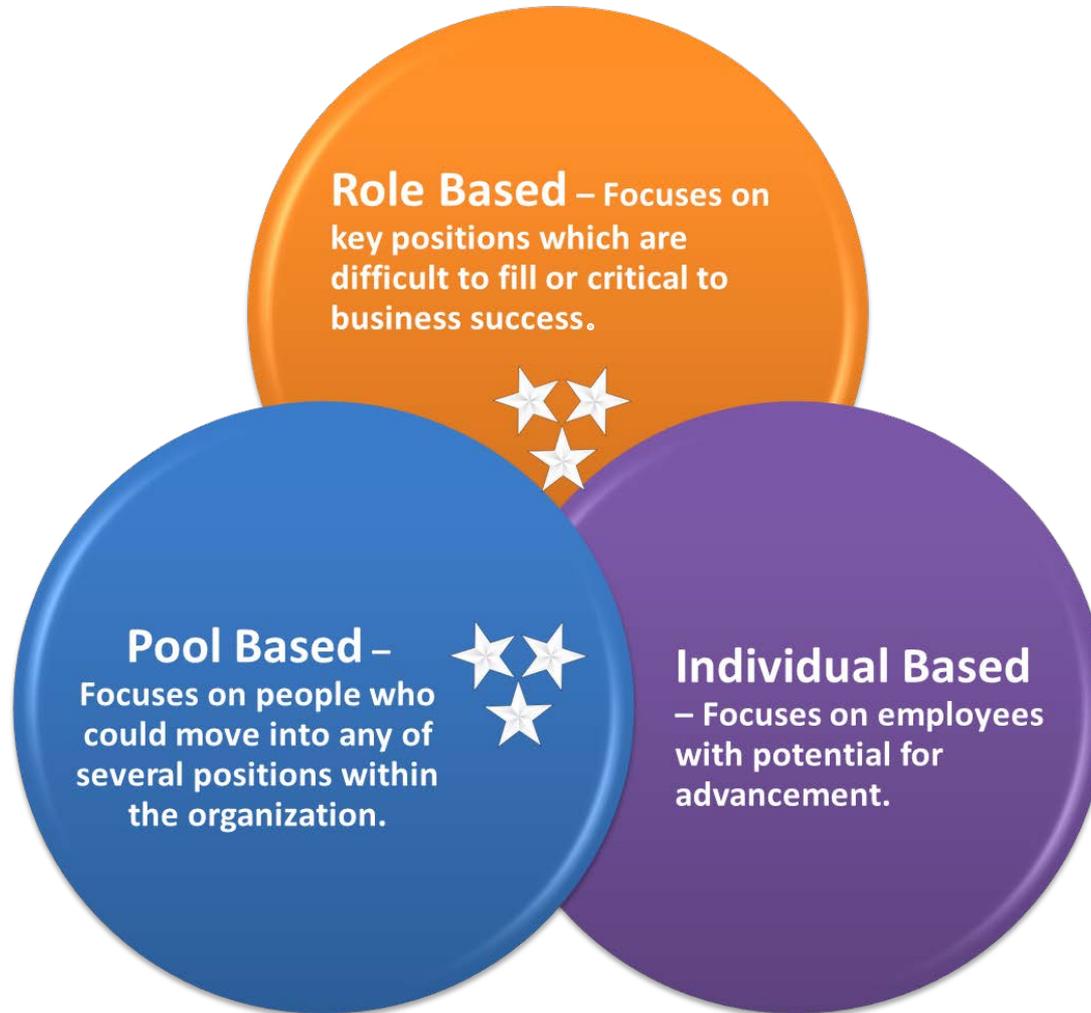
Your workforce development

- Discuss what your agency is currently doing in the area of Talent Management, around the ten practices.

Organizational Leadership and Navigation

Succession Planning – The process an organization uses to ensure that employees are developed to fill key roles.

3 Types of Succession Planning



The Talent Review Process

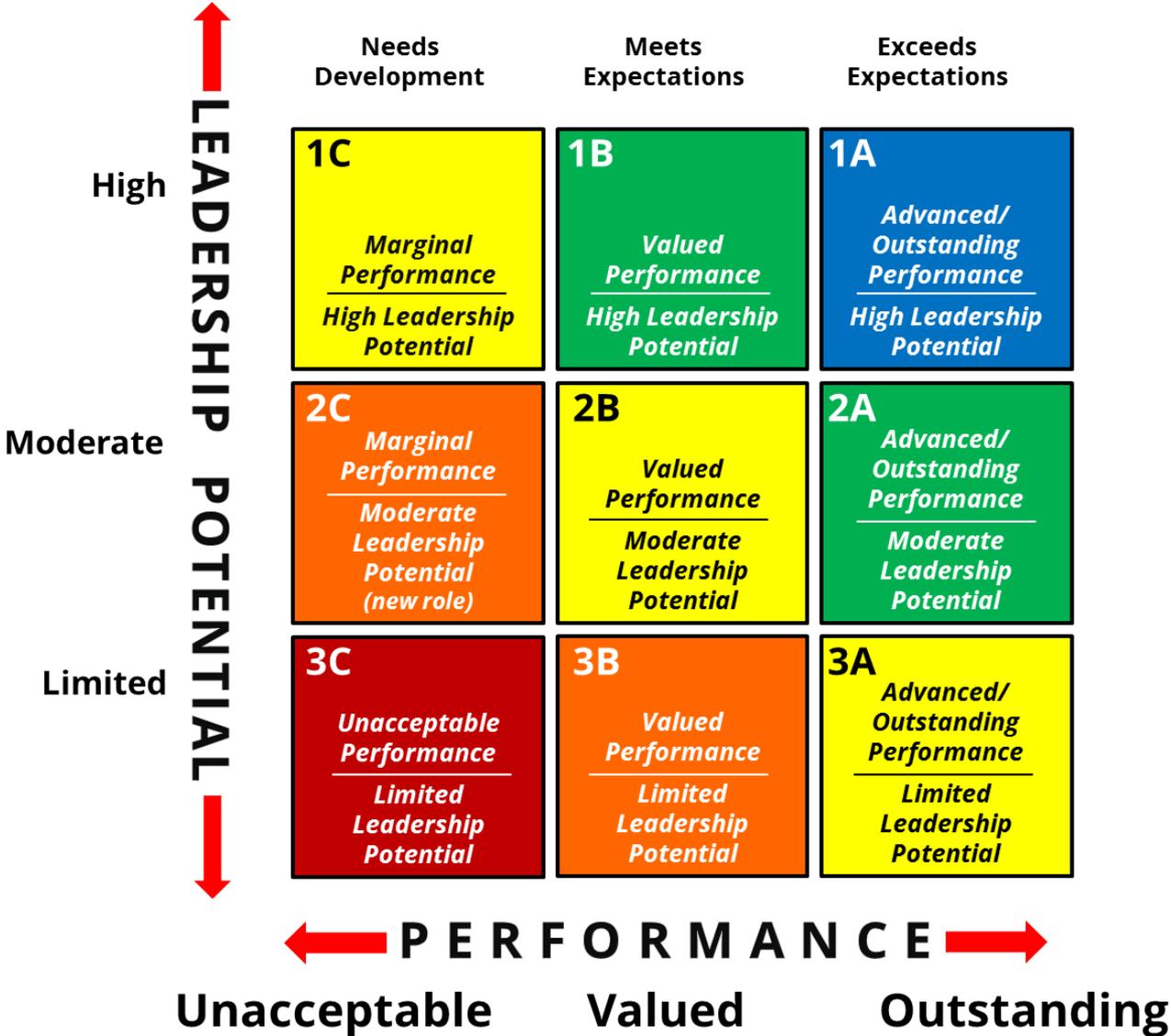
The Talent Review Process is a tool to help supervisors and employees assess the technical skills, abilities, subject matter knowledge, relationship-building capabilities, and the capacity for growth and development into leadership roles for all employees. The result is the identification of development needs across the agency.

Talent Reviews

Talent Reviews – The Process

- **Discuss specific performers and overall talent depth in context to business performance**
- **Analyze organizational strengths and challenges**
- **Set talent priorities**
- **Determine how to develop mission-critical talent**

9 Box Performance-Potential Matrix

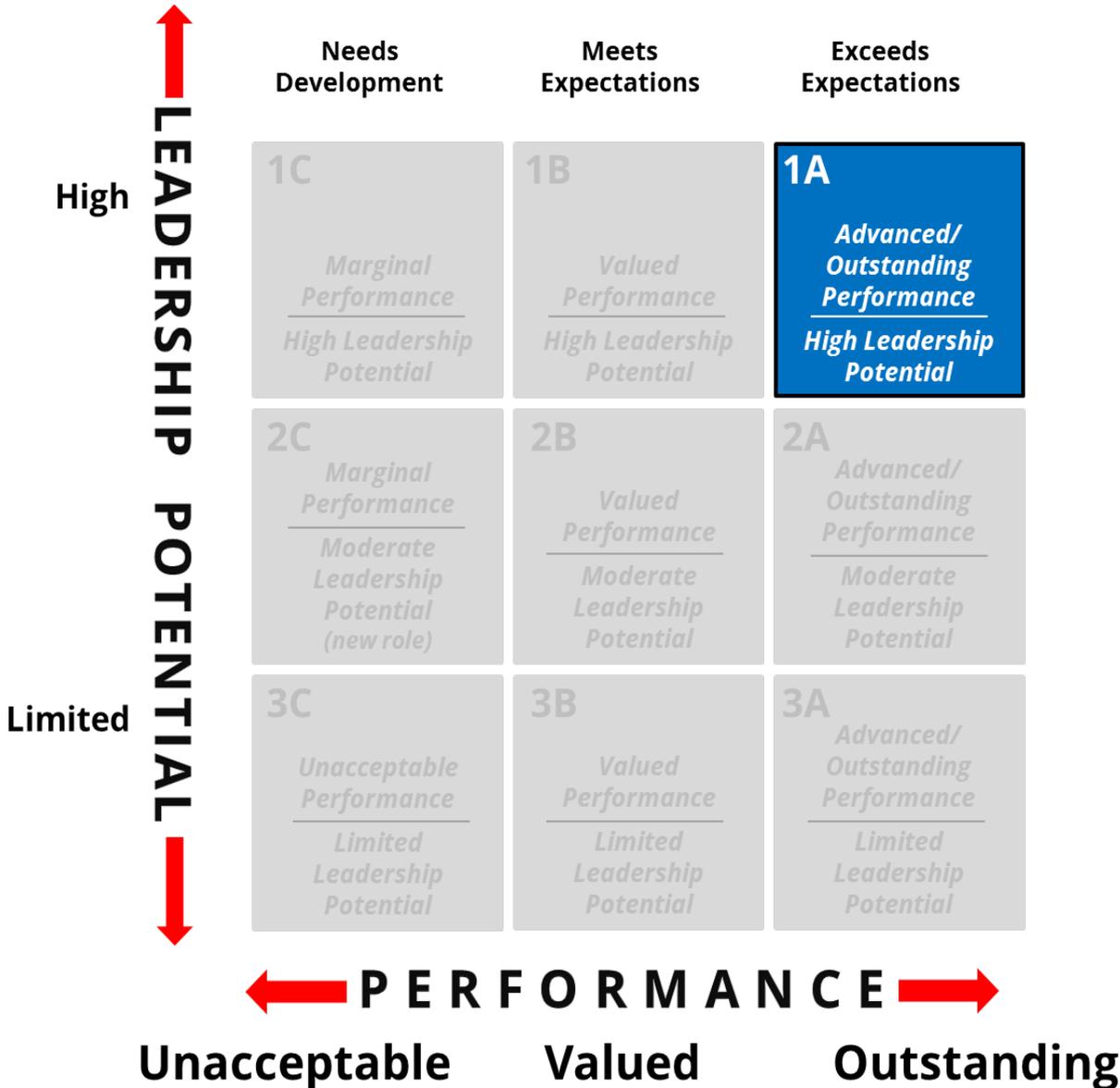


Performance - technical skills, abilities, and subject matter knowledge in job related field; ability to develop and maintain working relationships which incorporate agency values.

Potential - the ability or capacity for growth and development into a leadership role.

Leader - one who guides, directs, influences, and shows the way to others.

9 Box Performance-Potential Matrix

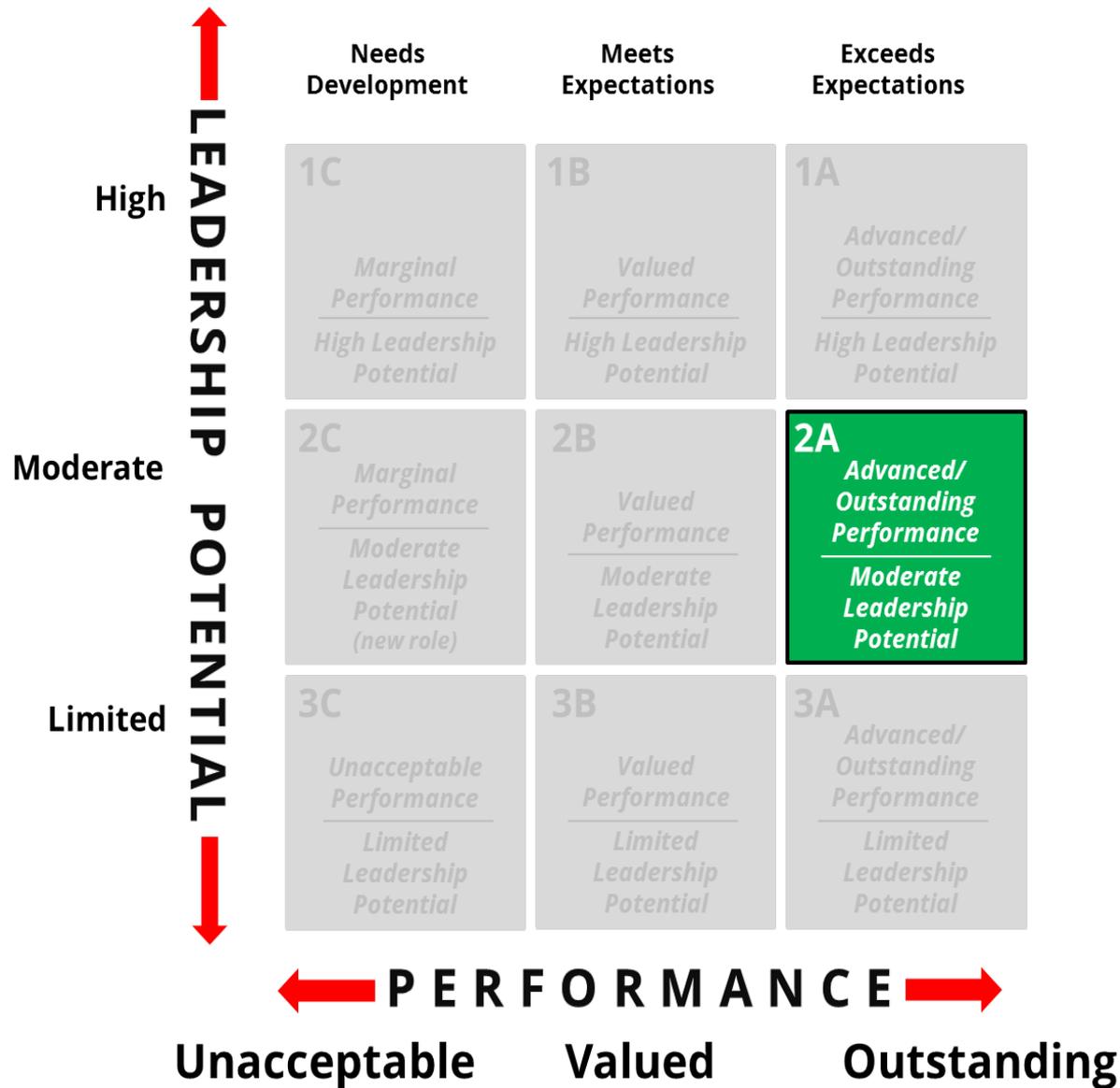


Outstanding Performance/High Leadership Potential: Definition: Individual is developing faster than the demands of his/her current position and/or division. Individual has been given additional assignments and has demonstrated high-level commitment/achieved significant results. Individual is ready to broaden his/her skill set and take on significantly greater scope and responsibility.

How do I know?

- Consistently performs above and beyond the current scope of his/her job; excels when given additional assignments
- Consistently integrates behaviors associated with agency's values; demonstrates behaviors associated with agency's core competencies
- Consistently seeks new opportunities for learning, leadership development, and advanced experience
- Independently researches solutions to problems and makes recommendations for improvement toward organizational excellence
- Demonstrates systems thinking and agency impact
- Places agency's success above personal achievement

9 Box Performance-Potential Matrix



Outstanding Performance/Moderate Leadership Potential:

Definition: Individual performs well in his/her current job, makes valuable contributions and consistently demonstrates competencies required. May be ready to take on greater scope and responsibility in the next 12 months.

How do I know?

- Performing above expectations; however, manager is not certain about his/her capability to handle increased scope and complexity
- Demonstrated capability to take on more work or additional projects; willingly accepts new assignments of increasing difficulty level
- Seeks opportunities to improve both self and organization
- Shows understanding of organizational mission, values, and core competencies through demonstrated behaviors; seeks to integrate them into daily work

9 Box Performance – Potential Matrix

		Needs Development	Meets Expectations	Exceeds Expectations
High	↑ LEADERSHIP POTENTIAL ↓	1C <i>Marginal Performance</i> <hr/> <i>High Leadership Potential</i>	1B <i>Valued Performance</i> <hr/> <i>High Leadership Potential</i>	1A <i>Advanced/ Outstanding Performance</i> <hr/> <i>High Leadership Potential</i>
Moderate		2C <i>Marginal Performance</i> <hr/> <i>Moderate Leadership Potential (new role)</i>	2B <i>Valued Performance</i> <hr/> <i>Moderate Leadership Potential</i>	2A <i>Advanced/ Outstanding Performance</i> <hr/> <i>Moderate Leadership Potential</i>
Limited		3C <i>Unacceptable Performance</i> <hr/> <i>Limited Leadership Potential</i>	3B <i>Valued Performance</i> <hr/> <i>Limited Leadership Potential</i>	3A <i>Advanced/ Outstanding Performance</i> <hr/> <i>Limited Leadership Potential</i>
		←	P E R F O R M A N C E	→
		Unacceptable	Valued	Outstanding

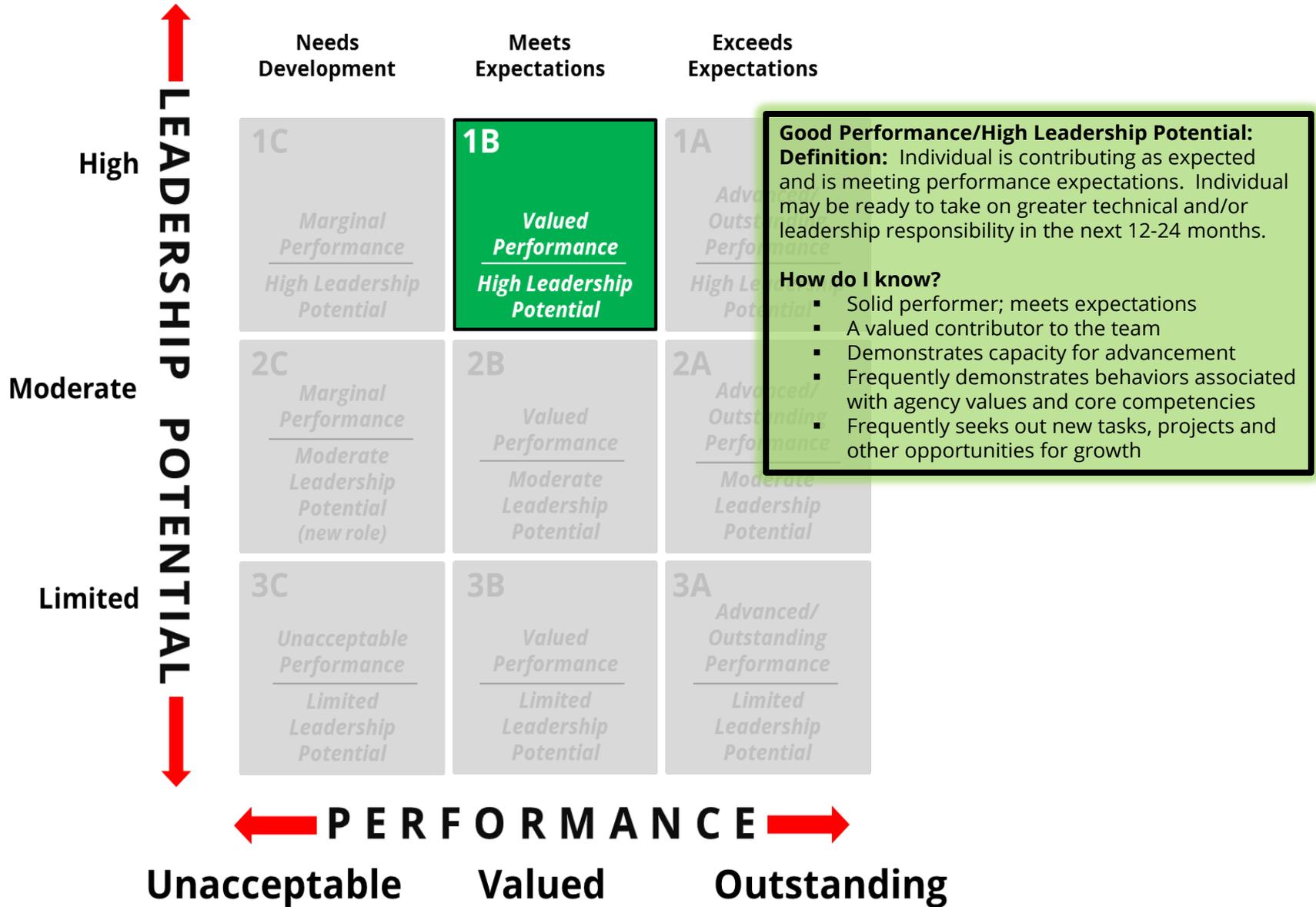
Outstanding Performance/Limited Leadership Potential:

Definition: Individual is performing well in his/her current job but needs to continue development in current role, or may have valuable technical skills but has not exhibited leadership potential. Individual has not demonstrated willingness to take on significantly greater scope and responsibility in the next 12 months.

How do I know?

- Performing at or above expectations
- Has not outgrown his/her current job and has growth opportunities within his/her role
- Seasoned professional with technical skills who does not currently exhibit capacity/desire for continued leadership development
- Understands that organizational mission, values, and core competencies are important but is still inconsistent in demonstration of behaviors and integration into daily work

9 Box Performance – Potential Matrix



9 Box Performance – Potential Matrix

		Needs Development	Meets Expectations	Exceeds Expectations
High	↑	1C <i>Marginal Performance</i> <i>High Leadership Potential</i>	1B <i>Valued Performance</i> <i>High Leadership Potential</i>	1A <i>Advanced/ Outstanding Performance</i> <i>High Leadership Potential</i>
Moderate	LEADERSHIP POTENTIAL	2C <i>Marginal Performance</i> <i>Moderate Leadership Potential (new role)</i>	2B <i>Valued Performance</i> <i>Moderate Leadership Potential</i>	2A <i>Advanced/ Outstanding Performance</i> <i>Moderate Leadership Potential</i>
Limited	↓	3C <i>Unacceptable Performance</i> <i>Limited Leadership Potential</i>	3B <i>Valued Performance</i> <i>Limited Leadership Potential</i>	3A <i>Advanced/ Outstanding Performance</i> <i>Limited Leadership Potential</i>
		←	PERFORMANCE	→

Unacceptable Valued Outstanding

Good Performance/Moderate Leadership Potential:
Definition: Individual is currently meeting expectations but may not be willing or able to advance; may not be ready to absorb additional scope or complexity in the next 12-24 months.

- **How do I know?**
- Individual is currently meeting expectations; Solid, consistent technical performance
- May lack demonstrated strategic thinking or relationship skills, may need additional time in current role
- Minimally expresses interest in expanded opportunities
- Demonstrated behaviors associated with agency values and core competencies are not consistent

9 Box Performance – Potential Matrix

	Needs Development	Meets Expectations	Exceeds Expectations
High	1C <i>Marginal Performance</i> <i>High Leadership Potential</i>	1B <i>Valued Performance</i> <i>High Leadership Potential</i>	1A <i>Advanced/ Outstanding Performance</i> <i>High Leadership Potential</i>
Moderate	2C <i>Marginal Performance</i> <i>Moderate Leadership Potential (new role)</i>	2B <i>Valued Performance</i> <i>Moderate Leadership Potential</i>	2A <i>Advanced/ Outstanding Performance</i> <i>Moderate Leadership Potential</i>
Limited	3C <i>Unacceptable Performance</i> <i>Limited Leadership Potential</i>	3B <i>Valued Performance</i> <i>Limited Leadership Potential</i>	3A <i>Advanced/ Outstanding Performance</i> <i>Limited Leadership Potential</i>

Good Performance/Limited Leadership Potential:
Definition: Individual is currently meeting the expectations of his/her role. Individual is not prepared to absorb additional scope or complexity in the next 12-24 months.

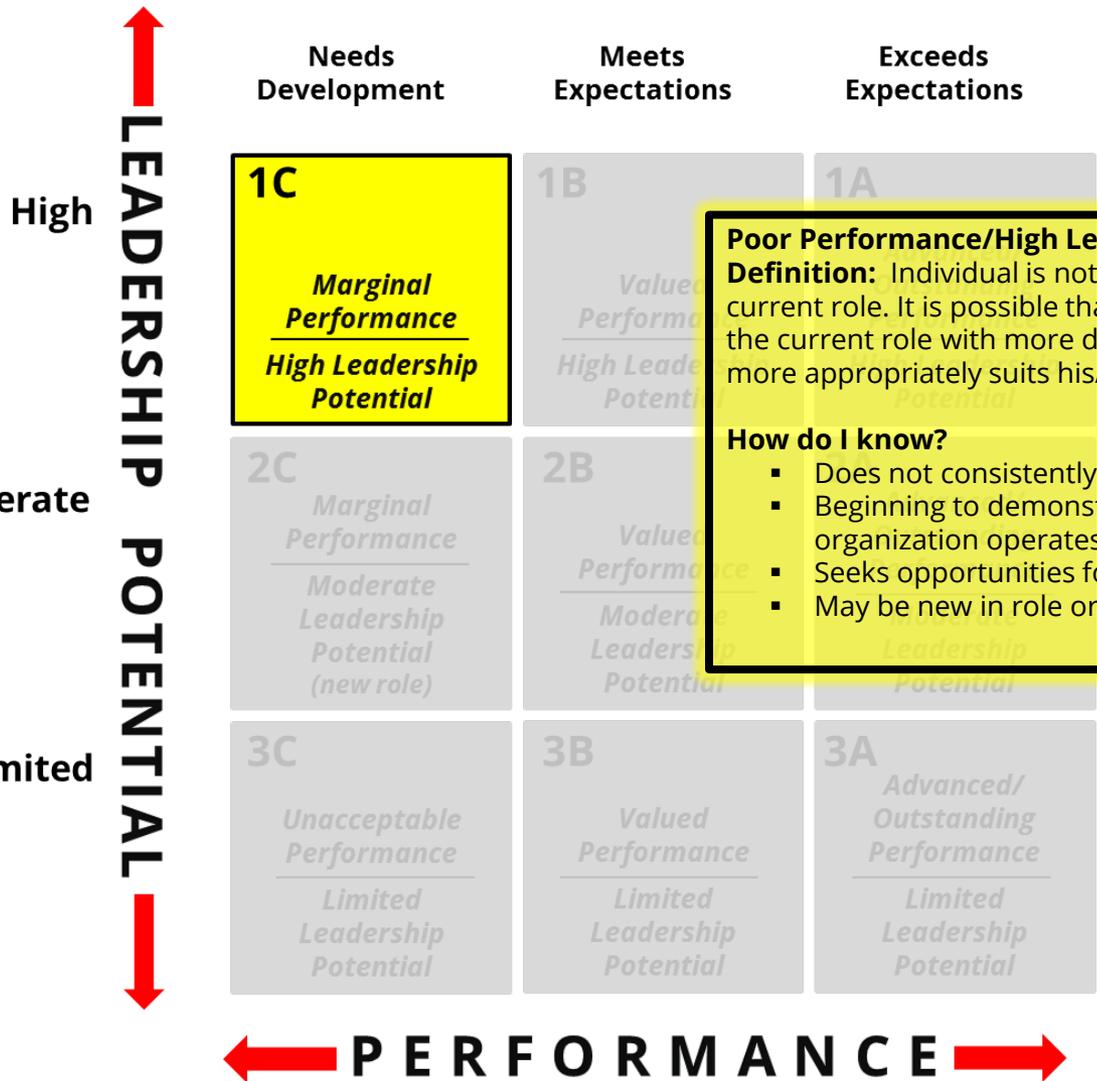
How do I know?

- Currently meeting expectations; steady, dependable
- Currently performing up to his/her potential
- If current role changed or expanded in scope, responsibilities may exceed this individual's capability at this time
- Demonstrated behaviors associated with agency values and core competencies are not consistent
- Does not exhibit interest in additional responsibility or leadership role

← PERFORMANCE →

Unacceptable Valued Outstanding

9 Box Performance – Potential Matrix



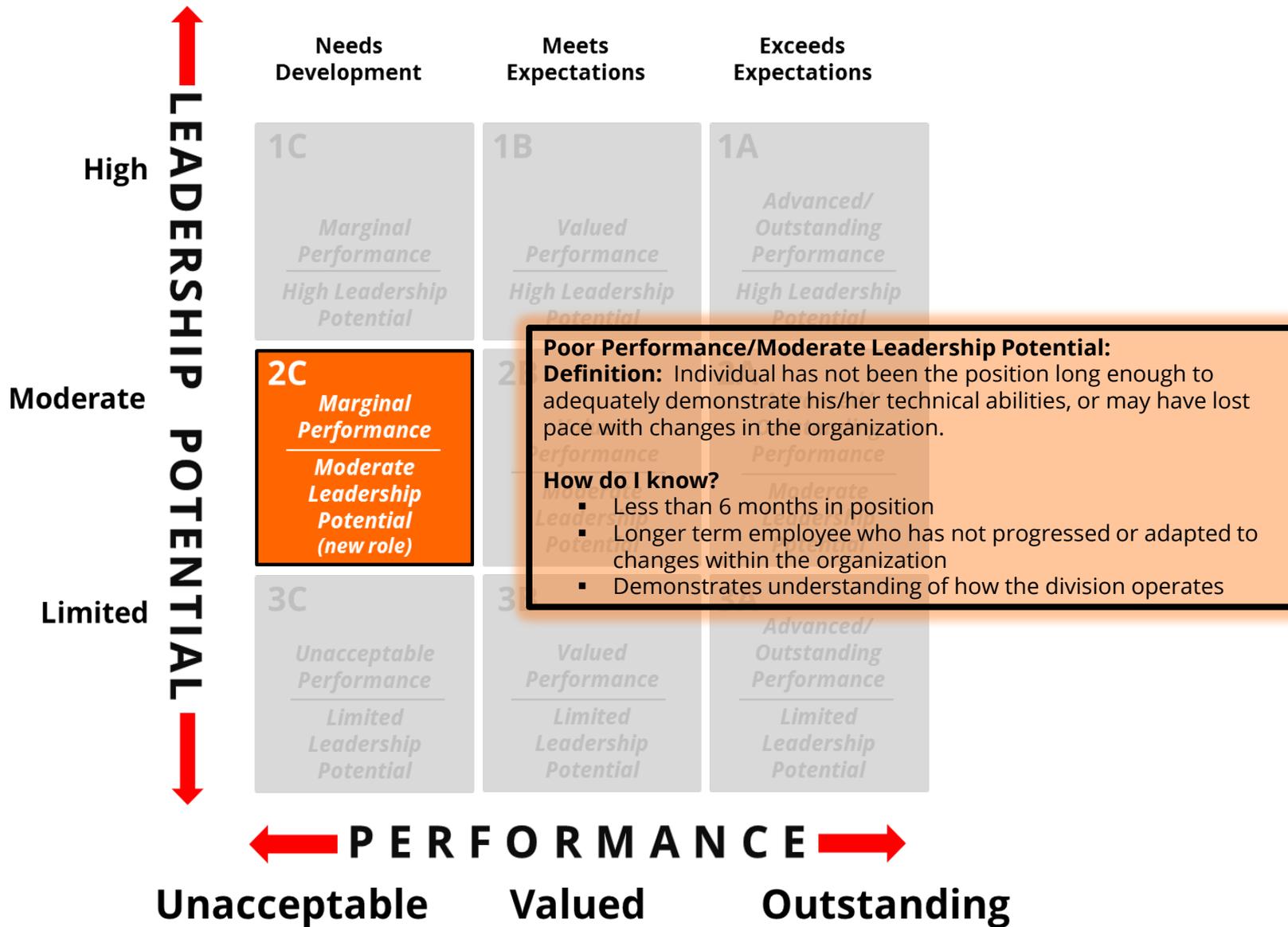
Poor Performance/High Leadership Potential:
Definition: Individual is not meeting the requirements in his/her current role. It is possible that individual could be more successful in the current role with more direction or in another role or division that more appropriately suits his/her skill set.

How do I know?

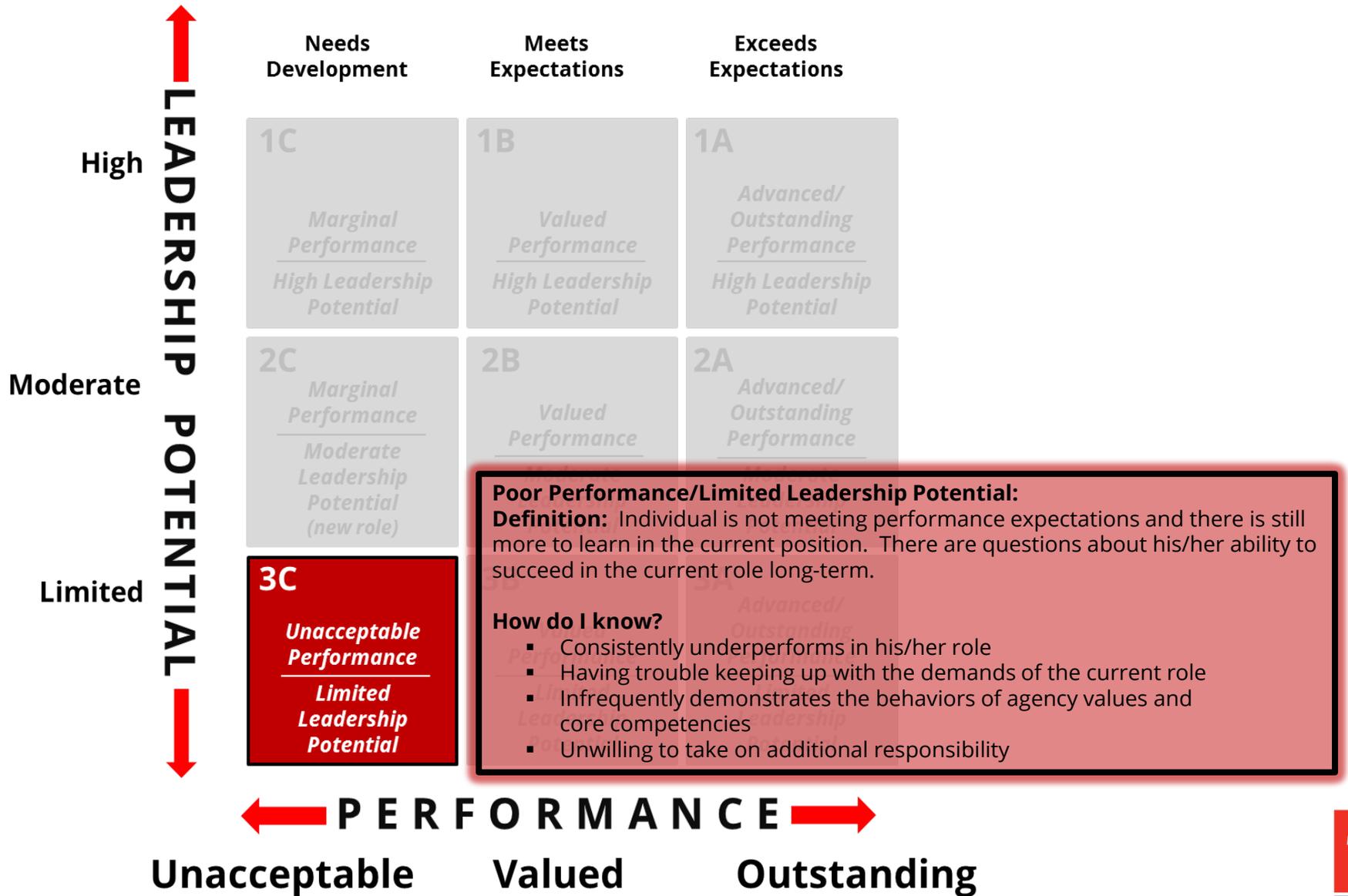
- Does not consistently perform to technical expectations
- Beginning to demonstrate understanding of how the organization operates
- Seeks opportunities for improvement
- May be new in role or new to organization

Unacceptable Valued Outstanding

9 Box Performance – Potential Matrix



9 Box Performance-Potential Matrix



Our friend...Edison ELM

- Capturing of employees' learning
- Automation of 9-box and succession planning
- Query possibilities
- Enterprise-wide impact
- Your foreseen challenges with this process?

Next Steps

- Learn more about your agency's workforce development needs
- Executive and senior leadership must get involved in TM
- TM Executive Series
- TM Review training and process
- I'm listening...!