

Talent Planning Worksheet

This is a confidential tool for your own use as a manager or supervisor. We suggest you use this tool once or twice per year to proactively address retention, succession and career development for your employees. The worksheet is designed to be usable for most positions within the UC, but you should feel free to modify it to meet the needs of your local context.

Date _____

Employee name _____

Employee job classification _____

Employee title _____

Years in role _____



Assess

Assess

Succession Planning

1. On a scale from 1 to 10 (1 = least impact, 10 = greatest impact), rate the potential operational impact of the employee's departure.
2. Who are the potential interim or permanent successors?
3. What training and how much lead time does the potential successor need for a successful transition?

Proactive Retention and Engagement

Note: Consult relevant administrative policies or union contracts for guidance on what may be possible for a specific position. Contact your local HR representative if you have questions.

1. What is likeliest to lead to dissatisfaction/departure for this employee (professional growth opportunity, higher salary, retirement, etc.)?
2. What are this employee's career goals?
3. How can I support this employee's career goals?
4. What are this employee's preferences/needs regarding work/life balance?
5. How can I support these work/life balance preferences/needs?
6. What are this employee's preferences for receiving recognition?
7. Is this employee's position appropriately classified? When was the last time the job description was reviewed? Does it need to be updated?
8. Is the role of this position clearly defined, communicated and integrated into the overall team? If not, what is needed to clearly define, communicate and integrate the position?
9. What other proactive retention strategies might be helpful?

10. How has implicit bias potentially inhibited the development, advancement or retention of this employee?

Planning for Potential Counteroffer

Note: Job offers can happen quickly. Are you prepared to counter if needed?

1. Do HR policies/union contracts allow a salary counteroffer if necessary? (Talk to your local HR representative.)
2. What non-salary options could you include in a counteroffer (schedule flexibility, hybrid/remote work, professional development opportunities, etc.)?



Communicate

Communicate

Plans and Timelines

Note: Proactive retention is an ongoing activity. What are your plans for the future?

1. When did you last have an engagement, stay or career development conversation with this employee?
2. What is the target date for your next engagement/stay/career development meeting with this employee?
3. What information do you hope to gather at this next meeting?



Measure/Implement

Measure/Implement

Implementation of Insights and Use of Campus-Based/Systemwide Resources

Note: What have you implemented in response to discussions with this employee? What insights are available from various campus and systemwide survey tools and other initiatives that might be relevant to this employee?

1. Based on the outcome of your last discussion with this employee, what items have been addressed and which need further attention during this period?
2. Have you considered how campus or systemwide resources (engagement surveys, climate surveys or other resources) may be utilized in your efforts with this employee?