

UNIVERSITY
OF
CALIFORNIA

Talent Insight Playbook

2025

UCOP Organization Development

Empowering teams, Igniting purpose, Driving impact

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Overview

Talent Insight: Uncovering potential, planning for the future.

To strengthen our workforce in alignment with UCOP's strategic objectives, we must attract, develop, and retain talent at all levels.

The Talent Insight process is designed to align the right people with the right roles at the right time. The playbook includes:

- Identifying steps to prepare employees for new or expanded roles
- Strategies to prevent talent loss and fill talent gaps
- Building a strong team for future success
- Connecting employees with the right learning and support

The playbook asks key questions to understand your talent needs:

- What skills does the team need now and in the future?
- What opportunities are employees looking for?
- Do future roles match current strengths?
- Are employees ready and excited for new opportunities?
- What can we do now to prepare for the future?

Expected outcomes of the Talent Insight process:

- Align skills and experience with organizational needs and career opportunities
- Retain employees through personalized growth and development
- Build a strong pool of internal candidates for positions as they become available at UCOP or within the UC System
- Create professional development plans for all employees

What the Talent Insight process is not:

- Exhibiting bias for successor roles
- Identifying successors without clear objectives or processes
- A secret or exclusive process
- A process only driven from the top-down

How the Organization Development team can help:

- Guide you through the assessment of your future workforce priorities
- Coaching for talent development strategy
- Thought partnership on plan implementation
- Support with revisiting/refining strategy as new priorities and challenges emerge

Let’s connect for a conversation!

Four Stage Talent Insight process

This streamlined, four-stage, cyclical process helps your organization build a 1-3 year talent and workforce plan. The process is iterative, requires ongoing maintenance, and we're here to support you every step of the way.

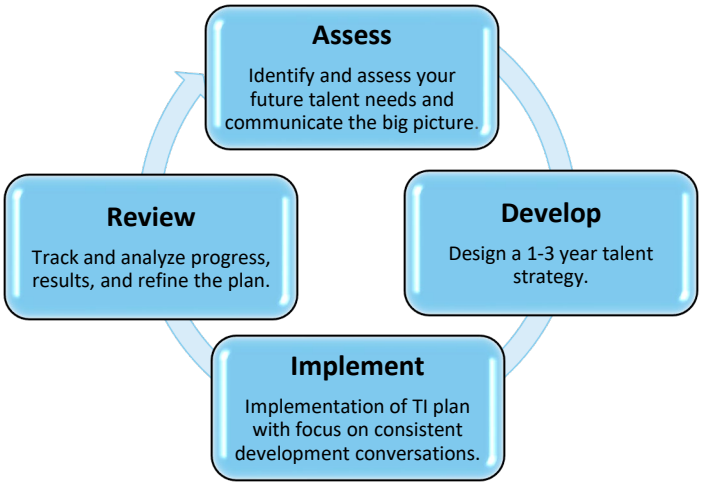


Figure 1: Talent Insight Stages

Everyone plays a role!

Roles		
Leadership (Division/Department)	**Talent Insight Committee /Managers/Supervisors**	**All Employees**
• Set the course for the future • Communicate your vision • Create a Talent Insight Committee (could be leadership team or a special committee) and serve as its chairperson • Serve as sponsor, accountable for the plan • Communicate to your organization how the process will function, who will be involved, and how staff will be engaged	• Actively participate in the process • Assess skill needs, gaps, and opportunities • Identify critical roles • Facilitate development planning with each of your employees • Be a champion for the TI plan • Partner in the development of a communication strategy	• Engage in development conversations with your manager • Take responsibility for career growth • Provide ongoing updates and accomplishments/challenges

Leaders can use this playbook to independently navigate each stage of the process. It provides step-by-step instructions, along with tools, templates, and resources to help organize your approach. For additional support or to plan your next steps, reach out to the Organization Development team.

Stage I - Assess

The Talent Insight (TI) process is about identifying the knowledge, skills, and abilities needed to take on future work and roles. The first stage of the process entails:

A. Identification of the Talent Insight Committee and engaging them in the process
B. Communication of the big picture to the department/team and
C. Assessment of future talent needs

A. Identification and engagement of the Talent Insight Committee

GUIDELINES	
Leadership	○ Identify your Talent Insight Committee. This could include: • Managers (all or a selection) • A Chief of Staff or Deputy • Human Resource Business Partner (HRBP) • A facilitator from the Organization Development (OD) team You decide who should be there. ○ Engage the Talent Insight Committee with the Process Launch Discussion Prompts (Tool 1).
Leadership & Talent Insight Committee	○ Respond to the Talent Development Culture Questionnaire (Tool 2) to highlight current organization mindsets, challenges, and opportunities. ○ Review the Debrief questions (Tool 3) to arrive at a collective sense of the current state and the changes needed.

B. Communication of the big picture to the department/team

It is critical that the entire department/team understands the vision, and purpose of the Talent Insight process. The Committee is responsible for developing a communication strategy. It's important that senior leadership takes responsibility for driving the communication plan.

While building the communication strategy, the Committee could consider the following:

GUIDELINES	
Talent Insight Committee	○ Determine which elements of communication must be delivered by the leadership.

	○ Communicate what the department/team learned from: a. Staff@Work Engagement Survey (reach out to the OD team if you need this) b. Talent Development Culture Questionnaire (Tool 2) c. Any other feedback channels ○ In sharing what you learned, invite supportive and actionable feedback. ○ Communicate the vision widely with leaders, through email, in staff meetings, and in one-on-one conversations.Some key points to cover: a. The case for change - Why are we doing this work? b. The project scope - What is the scope of the work moving forward? c. Inclusion - How employee voices and feedback have been incorporated in the vision? d. Project and plan timeline - What to expect? When? ○ Enable, empower, and track that all managers share the same message with individuals on the team. ○ Recognize and celebrate managers who have consistently used STEP as a tool for managing performance, and incorporated talent development practices in their team.

C. Assessment of future talent needs

The leadership and the Talent Insight Committee will need to develop a shared understanding of the talent needs of the department/team. The critical question to be answered is – What key knowledge and skills does the team have now and what will be needed in the future? For these conversations, the Talent Insight Committee may also include any managers whose teams will be involved with the Talent Insight process. The objectives of this step will be to:

- Identify the critical roles and associated skills, knowledge, & abilities (KSAs) that currently exist within the team.
- Discover the KSAs that will be needed in the future.

GUIDELINES	
Managers	○ Complete the department/team Talent Needs Assessment (Tool 4) as self-reflection. ○ Complete the Workforce Snapshot Template (Tool 5). The objective of this template is to help managers get a holistic view of all team members while planning for employee growth. This template aggregates the following data:

	• Job grades • Years of service in role and the UC system • Performance ratings for the last 5 years • Top 5 skills needed to be successful in the role • Employees' strengths and areas of development ○ Update this information as needed.

Stage 2 – Develop

In this stage, the Talent Insight Committee will craft a 1-3 year Talent Insight plan to develop all employees with specific focus on the identified critical roles.

STAGE 2 GUIDELINES	
Talent Insight Committee	○ Use the Stage 1 Summary (Tool 6) to start a conversation. This helps ensure everyone agrees on the department/team's needs before making talent decisions.
Managers	○ Complete the Critical Roles Plan (Tool 7) to formalize future talent needs and bring for a discussion with the TI Committee. While completing the Critical Roles Plan, refer to the Workforce Snapshot Tool.
Talent Insight Committee	○ Design a comprehensive Critical Roles Plan for the whole department/team. Review the plan: discuss each critical role, who might be a good fit, and their development needs. Refer to the Workforce Snapshot Tool.
Managers	○ Engage in UC Experience Conversations (optional). Suggest managers invite members of their respective teams to participate in a UC Experience Conversation to better understand their UC experience.

In the next stage, managers engage the staff by facilitating individualized professional development conversations.

Stage 3 – Implement

The Implementation stage offers a clear, ongoing process to support teams through a Professional Development Plan (PDP) - employee-led, manager-supported, and organization-backed. Employees set meaningful goals, identify needed skills and experiences, and build an action plan. Together, employees and managers focus on priorities that benefit both individual growth and organizational success.

STAGE 3 GUIDELINES	
Leadership	○ Begin with setting and communicating expectations about professional development plans for all employees.
Managers	○ Reinforce the messaging from leadership during team, and one-on-one meetings.
Employee and Manager	○ Use the PDP conversation and planning tool (Tool 8) as a guide to facilitate a conversation around goals, strengths, and development opportunities for the employee. ○ Managers: Refer the Workforce Snapshot Template (Tool 5). ○ Employee: Capture the shared understanding of employees' development goals and an action plan in the PDP form (Tool 9) and add the development goals to their STEP form. ○ Managers and employees, are encouraged to use the UC Core Competency Development Guide. The guide provides some activity ideas and classes that will help employees with their development.
Manager	○ Ensure that each employee adds a development goal to their STEP form clearly specifying the action steps.

Stage 4 – Review

The fourth stage involves annually reviewing Talent Insight efforts by measuring, assessing, and refining the plan. The Talent Insight Committee evaluates progress using success metrics, identifies improvements and opportunities, and updates the plan as needed. Ongoing tracking is essential to sustain this multi-year effort.

STAGE 4 GUIDELINES	
Leadership & Talent Insight Committee	Select metrics to measure and assess the success of the talent development effort across key topics. Consider the metrics provided below or add division/department specific metrics. Check-in annually to ensure you are on track and to refresh the plan to account for staff and/or organizational changes. Use the Talent Insight Plan Review Template (Tool 10) to help you focus on the progress related to your TI Plan. Revisit these questions with the leadership team to gather feedback and inform future planning. ○ Fully update your Talent Insight plan once every three years or upon any significant organizational changes.

Metrics to Consider

High performing individuals, growth and mobility
○ Individuals with STEP rating of Outstanding or Exceeds Expectations ○ Number of individuals who have received promotions, role expansions, lateral moves, reclassifications
Participation in learning opportunities
○ Number of individuals participating in classes (internal or external) ○ Budget allocated for development ○ Time available for / time spent on learning ○ Number of employees with Professional Development Plan ○ Managerial support for participation in Learning & Development effort

Inclusion and Belonging
○ Number and diversity of qualified internal candidates for key positions ○ Diversity of leadership ○ Diversity of teams ○ Participation in employee resource groups (identity-based orgs, communities of practice, etc.)
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)
Department/Division Satisfaction (as measured by Staff@Work survey): ***Reach out to OD team for your department/division Staff@Work survey results.***
○ Overall satisfaction score for the Department/division ○ Employee Net Promoter Profile Score (eNPPS) ○ Retention score ○ Career advancement score ○ Career development opportunities ○ Support for training and education from the supervisor

Appendix – Tools and Templates

Stage 1: Assess – Tools and Templates

Tool 1 - Process Launch Discussion Prompts

Back to Stage 1

What is our department's/team's current talent development culture?
What is enabling growth and development for members of the team?
What is getting in the way of their growth and development?

Tool 2 - Talent Development Culture Questionnaire

Click here for the interactive online version

Back to Stage 1

Statement	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
Managers are responsible for enabling employee growth and development.	☐	☐	☐	☐
Employees are responsible for taking ownership of their career development and growth.	☐	☐	☐	☐
All employees consistently engage in the Staff Talent Evaluation Process (STEP) check-in conversations and developmental coaching conversations.	☐	☐	☐	☐
Positive, constructive, and actionable feedback is shared openly throughout the division/department.	☐	☐	☐	☐
Our division/department has a policy affirming that employees have a protected number of hours to be used for professional development annually.	☐	☐	☐	☐
Our job descriptions are written to include “continuing professional development” as part of every job.	☐	☐	☐	☐
I have a personalized development plan and professional development goals.	☐	☐	☐	☐
All of my team members have a personalized development plan and professional development goals.	☐	☐	☐	☐
Everyone can articulate our organization’s mission, vision, values, and goals.	☐	☐	☐	☐
Our leaders connect employees and support cross team and cross functional work.	☐	☐	☐	☐
We create space for learning and practicing new strategies to enhance work and support continuous improvement.	☐	☐	☐	☐
Employees on every team know that they can bring forward creative ideas, as well as better and new ways of working.	☐	☐	☐	☐
Our division/department is equitable and diverse; marginalized communities are represented, included and appropriately recognized in spaces of thought partnership, collaboration, and decision-making.	☐	☐	☐	☐
Our team is ready to respond quickly to new challenges.	☐	☐	☐	☐
Our division/department takes calculated risks; employees understand how to work and lead by careful estimation of probable outcomes and plan with forethought.	☐	☐	☐	☐
Employees report that they can appropriately balance effectively doing their jobs and spending meaningful time on job and career growth activities.	☐	☐	☐	☐

Tool 3 – Talent Culture Debrief Questions

Talent Culture Debrief Questions
What were the key insights?
What are the high priority actions?
What will be most helpful to further enable growth and development?
What are the barriers?
What are the workarounds and/or creative ideas to overcome the identified barriers?

Back to Stage 1

Tool 4 - Talent Needs Assessment

Back to Stage 1

Strategic Focus - Based on our strategic plan, what's our focus? What workforce capabilities are needed to succeed in those strategic focus areas? *List 2–3 focus areas critical for future strategic success.* *Examples: retention, belonging, cost efficiencies, team resiliency, service focus, process improvement.*
Future outlook - How do you envision the work changing in the next 1-3 years? What workforce capabilities are needed to address those shifts? *Consider how your unit is evolving compared to others within the organization and global trends (e.g., automation, cost efficiency). Also consider the changes planned in the department/team.*
Team inputs - Managers solicit input from their teams about the above questions.

Tool 5 – Workforce Snapshot Template (sample)

Employee Name	Position	Grade	Time in the Role	Years in UC system	STEP Rating for the last 5 yrs	Top 5 Key Skills Needed for the Role	Employee Strengths	Employee Areas of development

Back to Stage 1

Back to Stage 3

Box link to ready to edit Workforce Snapshot Tool in MS Excel format.

Stage 2: Develop – Tools and Templates

Tool 6 – Summary and Plan Forward

Back to Stage 2

Discover - insights thus far
From the discovery thus far, what is clear for planning and action?
What's not clear? What needs further discovery and exploration?
Explore - the options to move forward
What are the first actions 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? OD team?
What is the role of leadership in seeing the plan through to success?
How will you gather and incorporate feedback on the Talent plan? *It would be ideal to gather perspectives and build alignment so that you are set up for success.*
How will you 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 are the key actions to engage the workforce in this process?
What are the key metrics we will 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 – ensure support and accountability
What are our measures of accountability?
What will we do to support managers? Individual contributors?
How will we onboard new managers?
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? (Check out UCOP Managing Implicit Bias series resources).

Tool 7 - Critical Roles Plan

Back to Stage 2

Position Title and Incumbent Role holder	Date Position is Expected to Open	Category*	Potential Candidates	Development opportunities for potential candidates
		☐ Current ☐ High Risk ☐ Retirement ☐ New		
		☐ Current ☐ High Risk ☐ Retirement ☐ New		
		☐ Current ☐ High Risk ☐ Retirement ☐ New		
		☐ Current ☐ High Risk ☐ Retirement ☐ New		

***Critical Roles Plan Legend**

Current:	All critical positions that are currently vacant in your department/team
High Risk:	All critical roles that are viewed as a high vacancy risk in the coming year
Retirement:	All critical positions currently filled by an incumbent who has declared an intention of retirement
New:	Any new / future critical positions you might create in the coming year to address organizational growth, or to lead new initiatives, new units, new growth areas, etc.

Stage 3: Implement – Tools and Templates

Tool 8 - Professional Development Plan Conversation & Planning Tool

Back to Stage 3

Employee	Manager
Where do I see myself in the future (my career and/or professional growth goals)?	Where do I see you in the future (growing in the current job or taking on new responsibilities)?
What do I see as my strengths and talents?	What do I see as your strengths and talents?
What do I see as my development opportunities?	What do I see as your development opportunities?
What do I see as possible development actions for me?	What do I see as possible development actions for you?
Integrating the above: Development plan I will commit to, and you will support this year.	

Tool 9 – Professional Development Form

Back to Stage 3

EMPLOYEE NAME:	**DATE:**
PROFESSIONAL GOALS / MOTIVATIONS What are my professional growth and career aspirations? How do I think these aspirations can be met at UCOP?	
TALENTS OR STRENGTHS TO USE MORE (3-5) What are my talents and strengths?	**DEVELOPMENT OPPORTUNITIES (1-2)** What knowledge or skills do I need to enhance?
FOCUSED PDP OBJECTIVES AND ACTION STEPS What development goals do I have for the next 12 months? The next 5 years? What specific actions can I take to achieve those goals?	
NEXT REVIEW MEETING DATE:	

Stage 4: Review – Tools and Templates

Tool 10 – Talent insight Plan Review Template

Back to Stage 4

What's working well?
How are we supporting and developing all our employees?
What are the areas of opportunity in the TI plan? What do we do to address them?
What needs revisiting and adjustment?
What will our focus areas be considering our aspirations and areas of opportunities?