

# The Talent Resilience Playbook:

**Because 'Winging It'  
Isn't a Strategy**

WIPFLI

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# Presenter



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# Agenda

Talent Philosophy

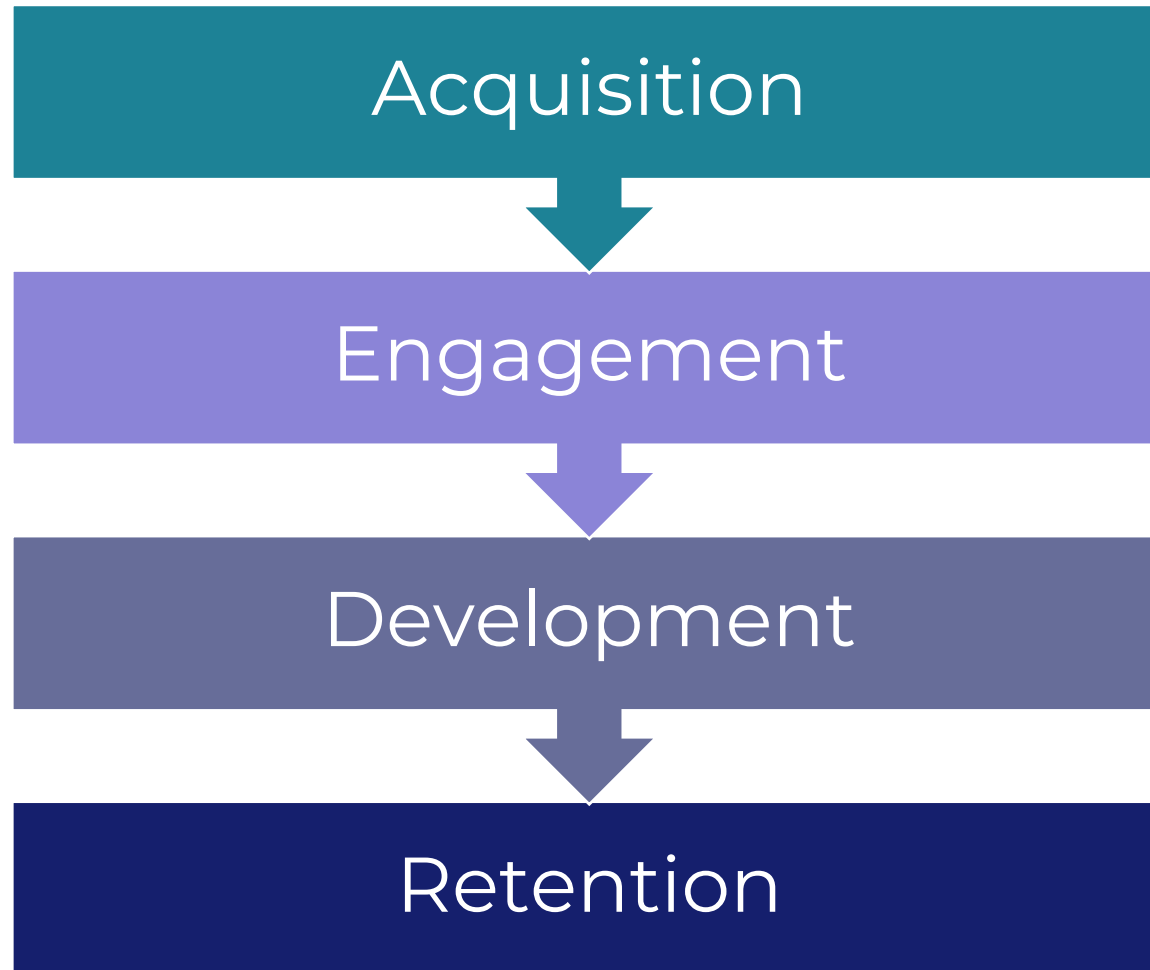
Succession Planning

Talent Assessment

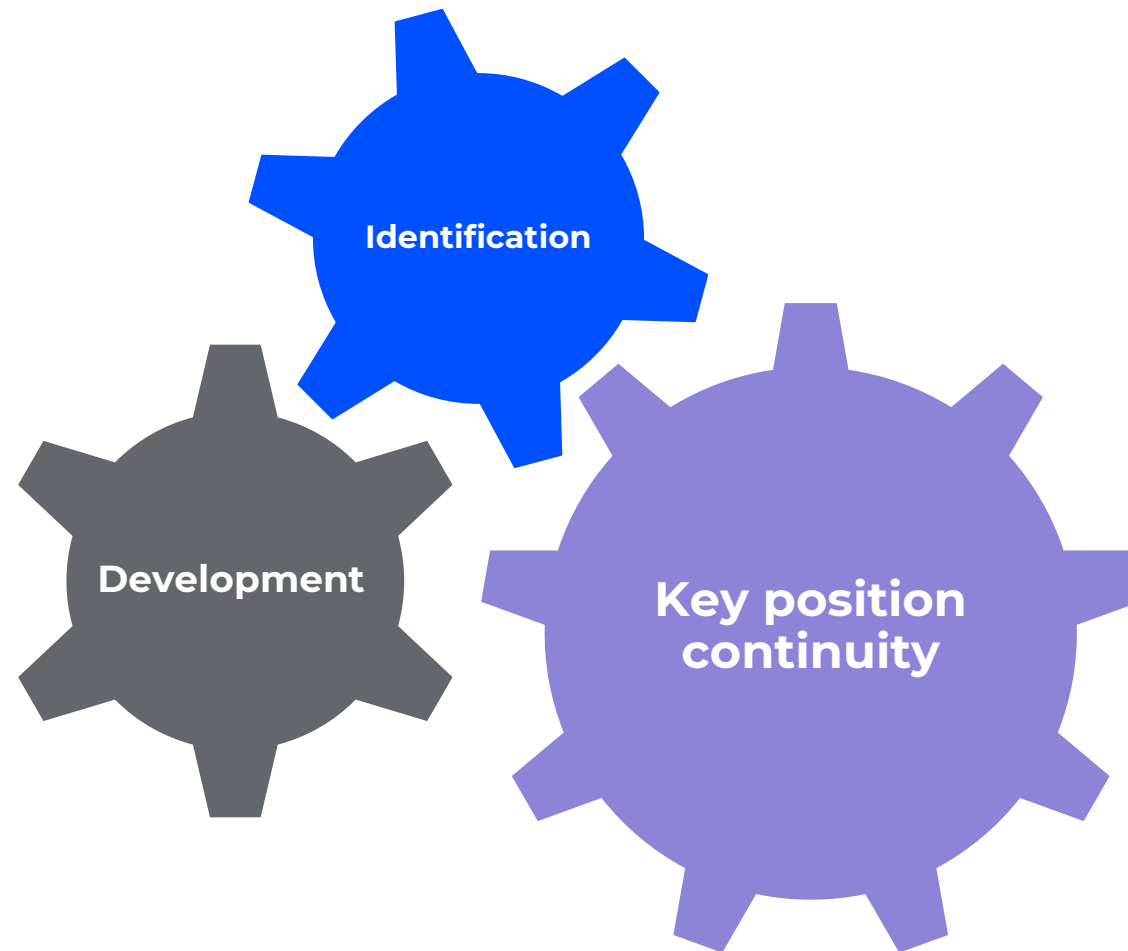
Employee Development Methodologies

Unlock our full potential

# Talent Philosophy



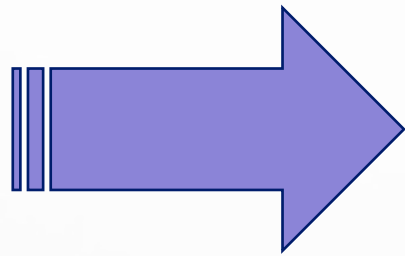
# Succession planning



A systematic and defined **process** to establish **continuity for key positions** by identifying and developing roles and people to fill them

## Succession Planning

- Leadership Continuity
- Mitigate risk
- Preservation of institutional knowledge
- Stability



## Talent Readiness

- Future-proof leadership
- Agility and adaptability
- Inclusive development
- Culture of growth



# Build the Future



What are you doing to prepare for succession in your organization?

# Succession planning model

## Critical steps

**1.**

Identify key positions

**2.**

Select competencies

**3.**

Assess current talent

**4.**

Create a succession plan

**5.**

Invest in talent development

**6.**

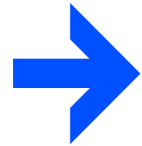
Implement succession strategies



1

## Identify key positions

**Skills**



**Urgency**

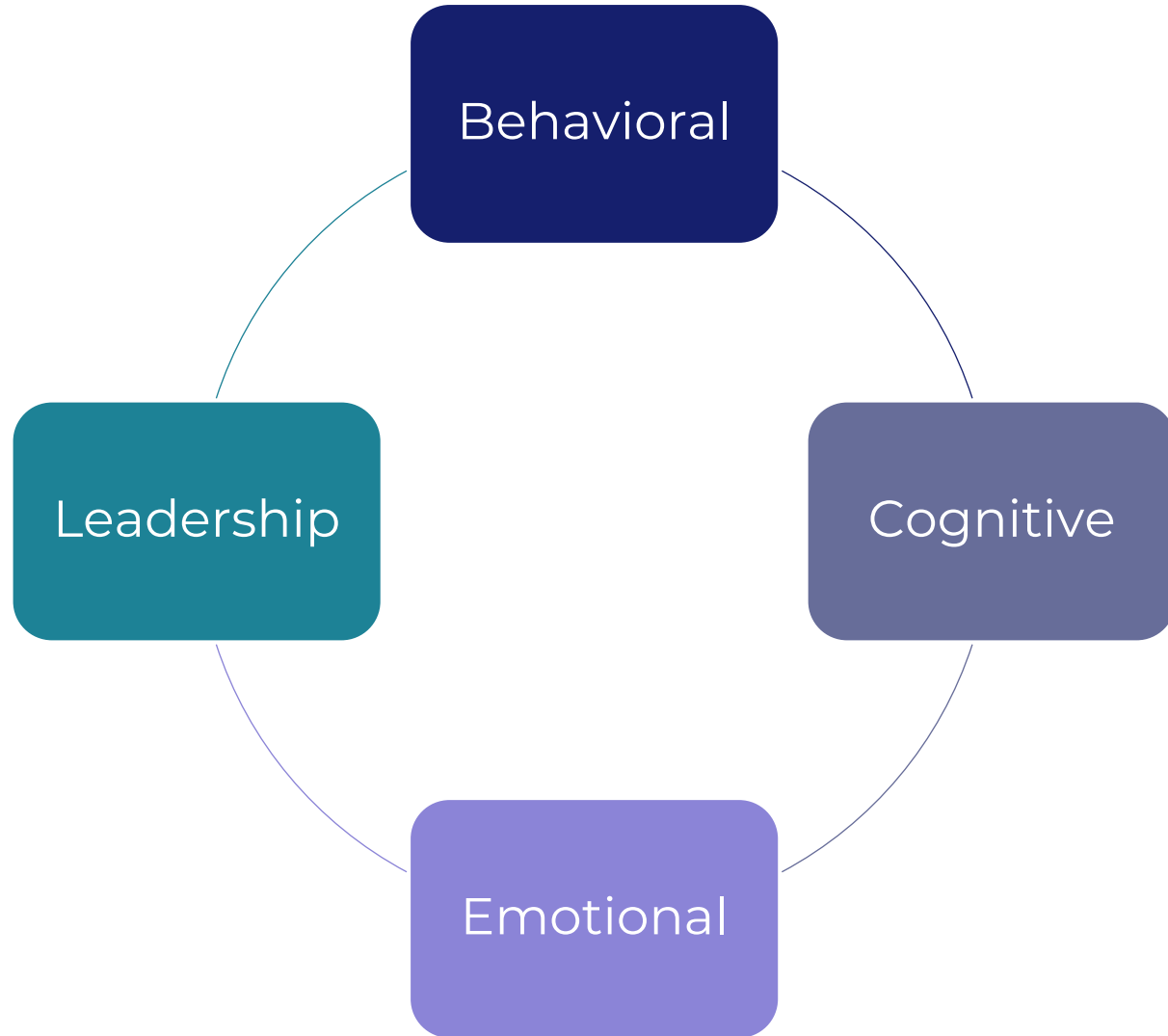


**Impact**



2

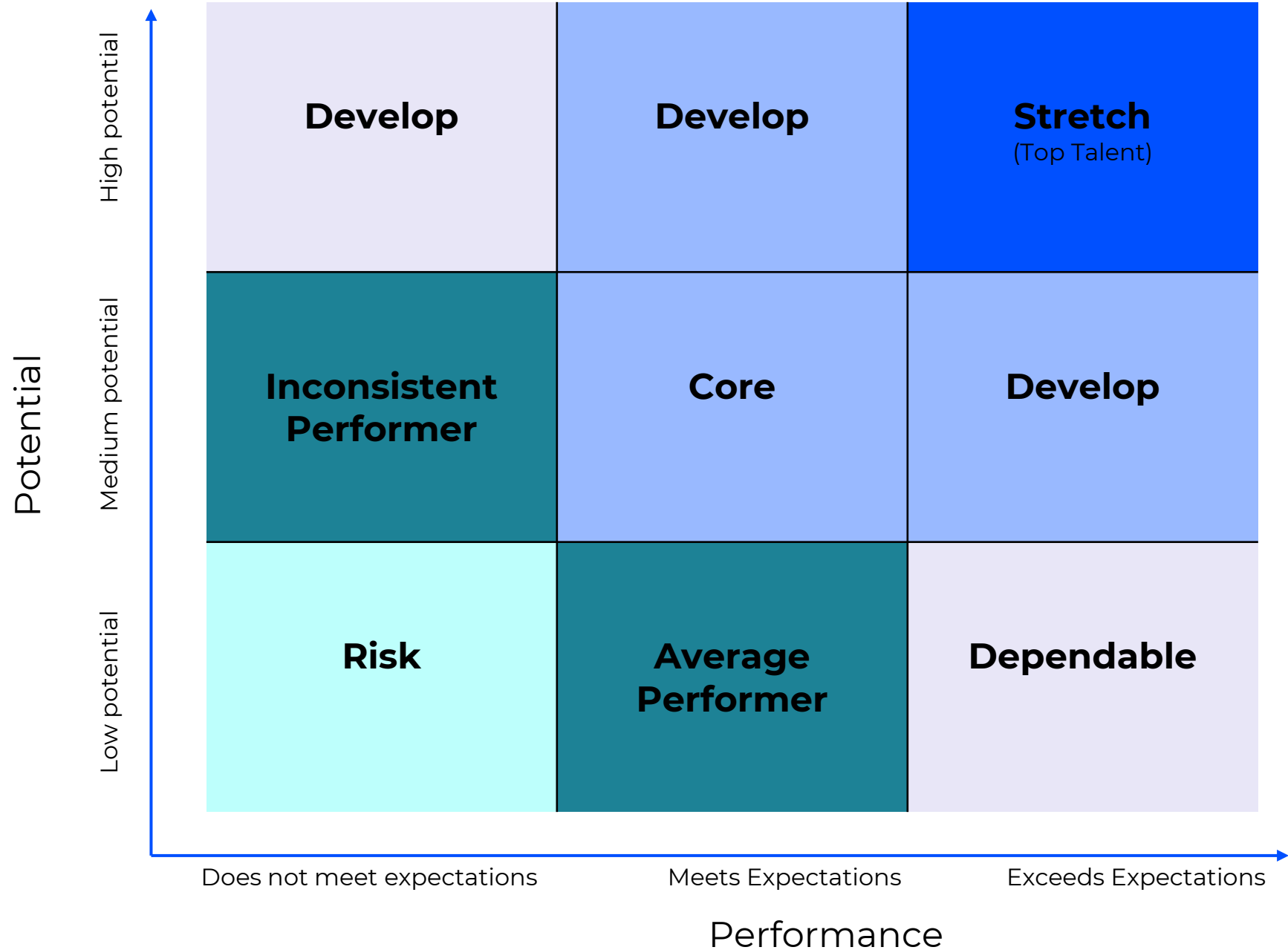
## Identify competencies



3

# Assess current talent

## Talent grid (9-box)



3

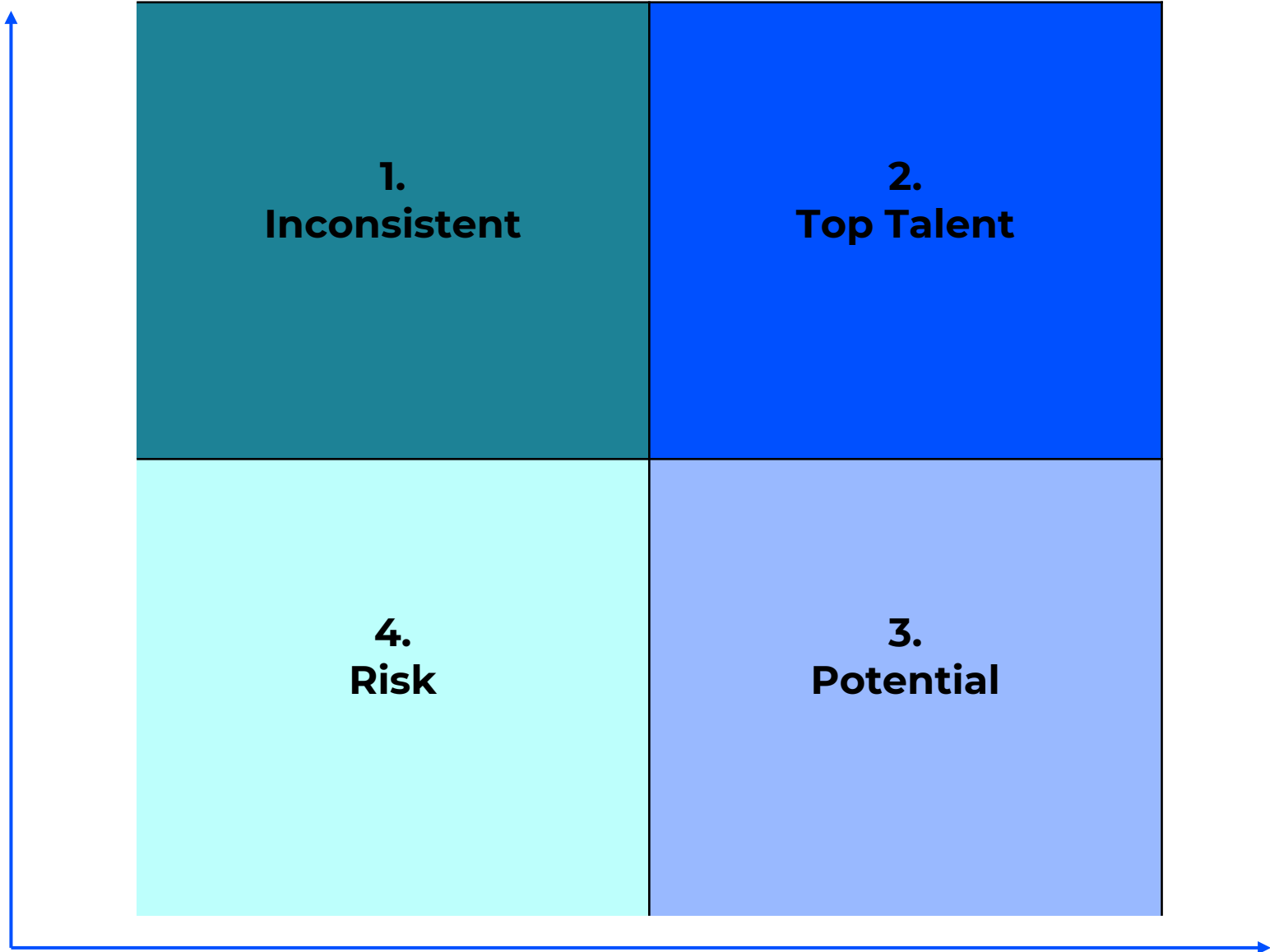
**Assess  
current  
talent**

**Talent grid  
(4-box)**

Will -or- Performance

High

Low



Low

High

Skill -or- Core Values

# 3

## Assess current talent

### Internal Bench Strength

- Percent of critical roles that can be filled with internal talent
- Readiness of current workforce
- Consider capacity, complexity and resourcefulness

### Least Afford to Lose

- Unique skillset, background, or experience.
- Institutional knowledge
- Single incumbents

### External Hire

- No internal bench strength
- Access to a diverse talent pool
- Fresh ideas and perspective
- Change dynamics and potential disruption



## Behavioral & Cognitive Assessment

Enables leaders to hire and develop people more effectively, the assessment provides insights into motives and needs expressed as behaviors and enables you as a leader to reach into relationships in an authentic and impactful way.



## Behavioral Assessment

Measures job-relevant behaviors, strengths, and risks to predict on-the-job success, going beyond personality to offer deep insights into how candidates fit roles and organizational cultures



## Emotional Intelligence Assessment

Used as an effective part of coaching and development, this instrument provides insights about strengths and opportunities as they relate to a person's emotional/social responsiveness and how these skills areas may be affecting relationships and how to refine and grow in these areas.

# 4

## Create a succession plan & assess talent readiness

<b>Company</b>							
<b>Succession Planning Readiness Chart</b>							
Position Title:							
Position Key Competencies:							
Position Key Competencies:							
Current Possible Incumbent:							
Evaluator Name:							

Incumbant Name	Current Position Title	Current Department	Readiness Level <small>(Place an X in appropriate column)</small>					Competency Strengths			Competency Development Needs		
			Interim	Ready Now	1-2 Years	3-5 Years	Long Shot	Strength	Strength	Strength	Develop	Develop	Develop

5

# Invest in talent development

## Individual Development Plans

Tailoring development plans to individual needs and career aspirations helps employees grow in their roles and prepares them for future opportunities.

# Individual development plan



Employee name		Job title	
Department		Direct supervisor	
Start date		Review date	

**Employee development goals to achieve**  
*What are your development goals for the next 12 months?*

1. Improve technical skills in data analysis
2. [Enter goal]
3. [Enter goal]

**Skill development**  
*Identify the specific skills or knowledge areas to develop in order to achieve the goals.*

Goal	Skills
Improve technical skills in data analysis	1. 1 R
	1.2 Python
[Enter goal 2]	[Enter skill]
	[Enter skill]

**Action plan**  
*Outline activities that are going to help achieve the development goals.*

Goal	Action plan
Improve technical skills in data analysis	1. 1 Have three 1-1 training sessions on R with the senior data analyst
	1.2 Enroll in an online R course
[Enter goal 2]	[Enter action plan]
	[Enter action plan]

**Resources**  
*What resources are you going to use to develop the skills and knowledge necessary to achieve these goals?*

Goal	Resource
Improve technical skills in data analysis	1.1 Online R course

**Feedback and evaluation**  
*What is the employee's progress in achieving their development goals?*

Goal	Status and comments	Date of check

**Signatures**

Employee		Manager	
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# Employee Development Plan Template

# Invest in talent development

## Individual Development Plans

Tailoring development plans to individual needs and career aspirations helps employees grow in their roles and prepares them for future opportunities.

## Mentoring

Opportunities to grow and develop skills, gain knowledge, and advance employees career can benefit both the mentee and mentor.

# Mentoring

## Structured

Organizations can have formal programs where mentors and mentees are paired based on their roles, skills, and career goals.

## Informal

Mentoring relationships can develop naturally without formal structure providing ad-hoc guidance.

## Peer to Peer

Colleagues at similar career stages can mentor each other offering mutual support and experience.

## Reverse

In this arrangement, younger or more junior employees' mentor senior staff on topics that they may be less familiar with.

## Group

One mentor works with multiple mentees simultaneously in a collaborative learning environment, often seen in leadership development programs.

# Invest in talent development

## Individual Development Plans

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Opportunities to grow and develop skills, gain knowledge, and advance employees career can benefit both the mentee and mentor.

## Formal Education

Formal education provides foundational knowledge and skills, preparing individuals for their careers and may be required for advancement.

# Invest in talent development

## Individual Development Plans

Tailoring development plans to individual needs and career aspirations helps employees grow in their roles and prepares them for future opportunities.

## Career Pathing

Providing clear career paths and advancement opportunities helps employees understand their potential growth within the organization, increasing retention and long-term engagement.

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# Sample career path plan

## Illustrative example

Job title	Program Aide	Program Coordinator	Program Manager	Assistant Program Director	Program Director
<b>Salary Range</b>	\$30,000-\$50,000	\$40,000-\$60,000	\$50,000-\$70,000	\$60,000-\$80,000	\$80,000-\$120,000
<b>Experience</b>	0-1 years	1-2 years	2-5 years	6-10 years	>10 years
<b>Education</b> (combination of education and experience can qualify)	High school diploma	Associates	Associates + additional training/education	Bachelors	Masters
<b>Skills</b>	<ul style="list-style-type: none"> <li>Organizational skills</li> <li>Time management</li> <li>Interpersonal skills</li> <li>Microsoft Suite</li> </ul>	<ul style="list-style-type: none"> <li>Planning and coordination</li> <li>Problem-solving</li> <li>Community engagement</li> </ul>	<ul style="list-style-type: none"> <li>Leadership</li> <li>Project management</li> <li>Budget management</li> <li>Conflict resolution</li> </ul>	<ul style="list-style-type: none"> <li>Grant writing</li> <li>Fundraising</li> <li>Operational oversight</li> </ul>	<ul style="list-style-type: none"> <li>Strategic vision</li> <li>Program evaluation</li> </ul>

\*Each position assumes the requirements build on one another and should be mastered before moving to the next position.

# Invest in talent development

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## Growth Opportunities

Involves various strategies to make jobs more engaging and fulfilling for employees and offers alternative ways to expand their skillset.

## Formal Education

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# Types of growth opportunities



# Invest in talent development

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## Professional Development

Pursuing additional learning opportunities beyond formal education, can enhance skills, knowledge, and competencies specific to employees current and future roles.

## Professional development categories

### Certifications

Programs that provide specialized training and credentials in areas like child development, IT, human resources, etc.

### Webinars

Short-term courses or workshops designed to update skills or knowledge in a specific field.

### Conferences

Events where professionals gather to learn about the latest trends, research and best practices in their industry.

### Self-Study

Independent learning through books, articles, podcasts, and other resources.

### On-The-Job Training

Learning opportunities occurring within the workplace, allowing employees to improve their competencies related to their regular job duties.



## Why employee development matters

- Employees believe professional development is the **#1 way to improve company culture**.
- Nearly **nine in 10 millennials say professional development and career growth opportunities are very important** to them in a job.
- Outside of pay, “career growth opportunities” is the **#1 reason people cited for changing jobs**.
- 94% of employees would **stay at a company longer if they** (the organization) **invested in their career development**.
- Employees who receive professional development opportunities are **15% more engaged** and have **34% higher retention**.

Do you offer any alternative career development programs we haven't discussed?

6

# Implement succession transition strategies

**29%**  
**Community Action Agencies**  
don't have a succession strategy

**19-21%**  
**Average Turnover**  
in nonprofits

Recruitment

Performance Management

Learning & Development

Compensation

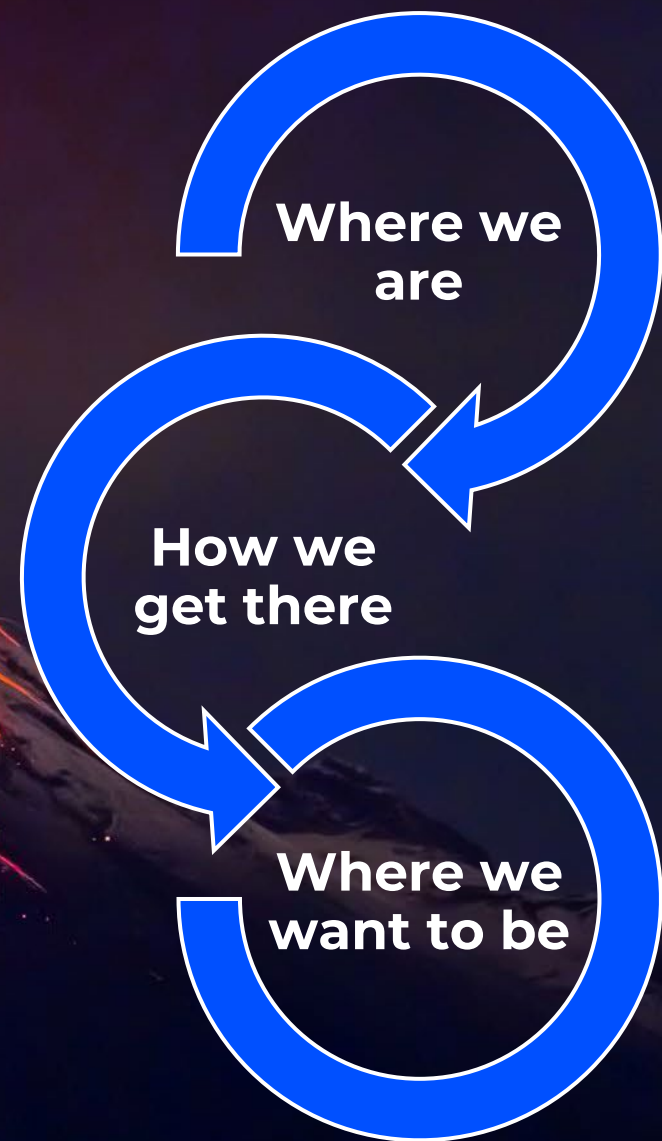
HRIS Technology

# Unlocking talent potential



# Recap

Shift from  
Reactive to  
Proactive



# Thank you for attending this presentation.

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