

Template to Conduct Talent Discussions by the Executive Team

To support the talent development efforts of local governments in California, Cal-ICMA is offering this online fillable template for use by the executive teams of local government agencies.

The Template for Talent Discussions is intended to serve as a simple format to accomplish several goals:

- Stimulate a discussion by the executive team assessing the strength of the agency's "bench" or current talent pool
- Assess any gaps in the agency's current talent pool
- Identify emerging leaders who have the potential to advance into more responsible leadership positions
- Help the executive team identify appropriate follow-up development opportunities for the high-potential employees

To support any executive team in conducting these talent discussions, Cal-ICMA is providing:

1. A blank online fillable template, including premises for the talent discussion by the executive team and suggested follow-up activities
2. A sample completed template
3. A menu of development activities to which the agency can add additional resources for emerging leaders

Premises Regarding Talent Discussions

- ✓ It is increasingly difficult to steal talent from other agencies; we must also grow our own.
- ✓ We don't focus on "position replacement" (for example, who will become the next finance director); rather, we strive to develop a robust pool of talented staff throughout the organization who can move into a variety of responsible leadership positions.
- ✓ The best talent development occurs by empowering employees to "learn by doing" coupled with helpful and candid coaching and feedback.
- ✓ Good development activities include stretch assignments, team leadership opportunities, job rotations, interim management assignments, professional involvements, mentoring, and coaching.

- ✓ We have a responsibility to ensure opportunities for a diverse range of candidates.
- ✓ There is no growth unless the person becomes somewhat uncomfortable.
- ✓ The executive team “owns” the talent pool (not the current department) and oversees the development of those in the pool.
- ✓ The best way to retain employees is to provide learning and growth opportunities.

Suggested Practices in Using the Template

To use the blank online template, it is recommended that the Chief Executive suggest at a regular executive team meeting that the team of Department Directors use this simple form or template to assess current or foreseeable talent challenges. Then the Chief Executive can review the premises for the Talent Discussions (see above) and these suggested practices, walk through the form, and ask the Department Directors to return in 3-4 weeks to a specially scheduled meeting of the executive team. This special meeting will allow the Department Directors to discuss high-potential employees, talent gaps, and development opportunities to accelerate the advancement of employees.

In order for Department Heads and Chief Executives to review their completed forms and get ample feedback from the other executives, it will probably require several special meetings.

Department Heads can suggest criteria for nominating emerging leaders for the initial talent pool, such as growth or leadership potential, learning agility, good relationship-building, or communication skills, etc.

There is tension between the desire to offer equitable development opportunities to all employees and the practical reality of limited time and other resources. It is recommended that those targeted for attention be considered the initial cohort or talent pool. The talent pool is continuously updated with new emerging leaders added to the pool and some dropping from the pool. In addition, all employees are provided with an opportunity to access all kinds of development opportunities (see “Menu of Development Opportunities.”)

There are several ways to nominate a high-potential employee into this initial talent pool. Department Directors (or their department management group) can suggest employees from their departments (the usual way); other Department Directors can recommend emerging leaders from other departments; and/or the department or organization can suggest that interested employees self-nominate.

When one Department Director is reporting on their talent, it is important that the other Department Heads provide feedback on their interactions with that employee as well as any interactions of their staff with the employee. As part of these talent discussions, other Department Heads may also recommend certain follow-up development activities or suggest “hidden stars” from the other departments.

After several talent discussions, the executive team collectively designates who is included in the initial talent pool.

Follow-Up to Talent Discussions

As a follow-up to the initial talent discussions, the executive team will designate a senior manager or middle manager to conduct a development conversation with each emerging leader in the initial talent pool and a follow-up development conversation. It is recommended that managers/coaches who conduct these development conversations participate in some training on how to have these coaching conversations, such as the virtual training offered by Cal-ICMA in the Spring of 2024.

To further assist the manager and the emerging leader, Cal-ICMA has also provided a menu of potential development opportunities from which the emerging leader can select appropriate learning and growth activities.

To ensure follow-through, it is suggested that a review meeting of development activities and progress be held by the executive team 6-8 months after the initial discussions.



The Department (for example: Planning):

Status of the Bench:

Anticipated talent gaps in your Department in the next 2-4 years:

- 1.
- 2.
- 3.

Talented Staff Person Name:

Current Position:

Readiness:

Strengths to leverage:

1.

2.

3.

Areas for development:

1.

2.

3.

Possible development activities:

1.

2.

3.

Who will conduct development conversation and provide guidance?

Report back to Executive Team/Committee:

Talented Staff Person Name:

Current Position:

Readiness:

Strengths to leverage:

1.

2.

3.

Areas for development:

1.

2.

3.

Possible development activities:

1.

2.

3.

Who will conduct development conversation and provide guidance?

Report back to Executive Team/Committee:

Talented Staff Person Name:

Current Position:

Readiness:

Strengths to leverage:

1.

2.

3.

Areas for development:

1.

2.

3.

Possible development activities:

1.

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Who will conduct development conversation and provide guidance?

Report back to Executive Team/Committee: