Strategic workforce planning
and talent management strategy

Legacy Project sip & session

August 2nd

bakertilly

Presenter

Megan Miles

Senior Consultant, Public Sector Advisory

P: +1 (312) 228 7317
M: +1 (414) 791 4512
E: megan.miles@bakertilly.com

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Agenda

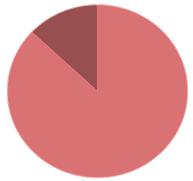
- **Why think strategically about talent?**
- Key components of talent management
- Creating the strategic workforce plan

Why think strategically about talent?

- Understanding the nature of work has dramatically and permanently transformed
- Adapting skills and competencies of managers and workers with the new environment
- Managing the changing workforce demographics (aging out, job hopping) requires proactive leadership
- Recognizing and valuing DE&I in the workplace

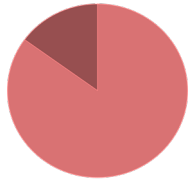
Why think strategically about talent?

68% of American workers say the ability to work both remotely and at the worksite is the idea workplace model.

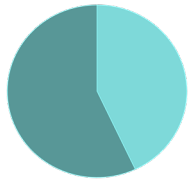


87% who have been working remotely want to keep working remotely at least one day a week.

52% workers say their company is going through significant changes beyond adjusting to the pandemic.



85% remote workers say their managers are responsible for connecting them to the company's culture.



43% remote workers say they would be nervous about job security if they worked remotely as others returned to the worksite.

About 33% workers would not want to work for an employer that required them to be onsite full time

About 67% workers say in-person interactions are important to their careers.

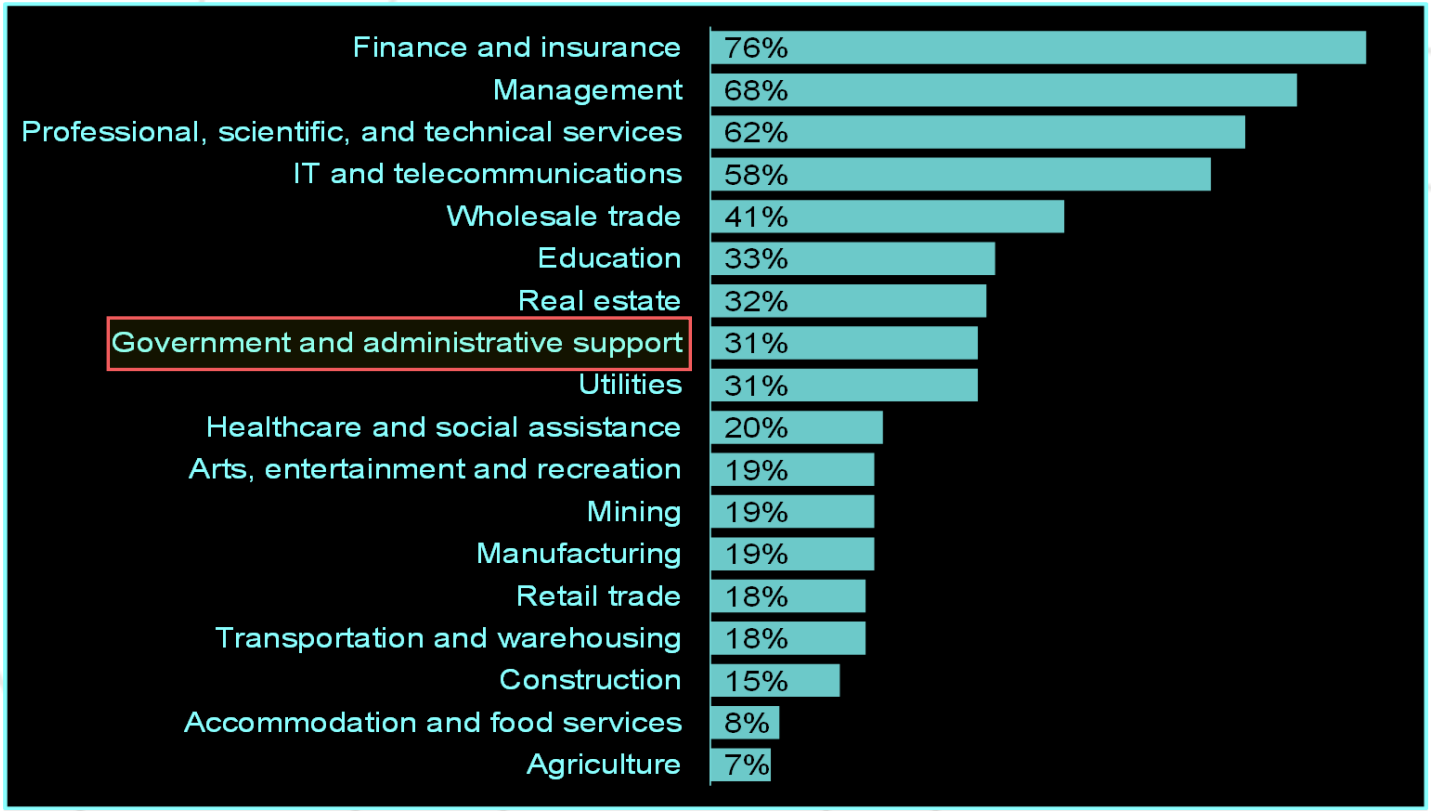
80% remote workers say senior leaders are responsible for connecting them to the workplace culture.

SOURCE: Society for Human Resource Management, HR Magazine, *The New World of Work*, June 2021

Why think strategically about talent?

The McKinsey Global Institute (2020) identified that 31% of the work of government can be completed remote without productivity loss.

Percentage of time spent on work-related activities that can be completed remotely without productivity loss by U.S. sector



SOURCE: The future of remote work: An analysis of 2,000 tasks, 800 jobs, and 9 countries | McKinsey

Agenda

- Why think strategically about talent?
- **Key components of talent management**
- Creating the strategic workforce plan

Key components of talent management

Selected talent management best practices

Talent acquisition

- Streamline employee requisition workflows, minimizing hand-offs and approvals
- Automate job requisitions using a modern applicant tracking system
- Present jobs as careers with exciting opportunities for the hire – not a laundry list of requirements
- Monitor diversity, equity and inclusion metrics throughout the recruiting funnel
- Use structured, behavior-based interview techniques

Selected talent management best practices

Talent development

- Give comprehensive onboarding upon offer of acceptance
- Provide employees with information on the organization's future talent needs and available opportunities
- Use an online, centralized learning management system
- Offer collaboration tools and platforms, such as communities of practice
- Evaluate training participation and satisfaction
- Career paths

Selected talent management best practices

Talent retention/sustainment

- Develop a formal, detailed succession management plan for senior and middle management
- Train managers on how to support employee wellness and work/life balance
- Include engagement, retention, DE&I measures in leader performance goals
- Design compensation plans to reward key behaviors supporting business goals
- Offer tangible and intangible forms of recognition at the individual and team levels
- Conduct “stay” interviews

Stay interview sample questions

- What are your long-term career goals?
- What about your job keeps you coming in every day?
- If you had a chance to change one thing about your job, what would it by and why?
- Do you feel welcome and valued by the organization? What about your colleagues?
- Are there any responsibilities you wish you could take on in your role? Are there any you would prefer to give to someone else?
- Do you feel you have a strong future with the organization? Why or why not?
- What could we do to improve your experience at the organization?

Agenda

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- **Creating the strategic workforce plan**

Creating the strategic workforce plan

Step 1: Know your data

- Turnover by position, by division and by department
- Retirement eligibility by position, career path, division and department
- Time to fill/time to hire – average and by specialty/hard to fill positions
- Employee engagement surveys
- Exit and stay interview data

Creating the strategic workforce plan

Step 2: Conduct a workforce gap analysis

Interview department directors and supervisors

- What are your biggest concerns relative to recruitment, employee engagement, employee development and employee performance management?
- Are there positions within your department that if they became vacant tomorrow, would have a significant impact on safety, customer satisfaction or achieving the organizations strategic goals?

Creating the strategic workforce plan

Step 2: Conduct a workforce gap analysis

Combining what you've learned from your data analysis, departmental interviews and your understanding of the workforce needs to achieve your organization's strategic goals creates a matrix of findings.

- i.e., 50% of the line department is eligible to retire within the next three years. Potential impact to organization: HIGH timeframe to address: 6-12 months
- i.e., Multiple department directors expressed a lack of confidence in the "soft" skillset of direct supervisors to coach, mentors and engaged employees. Potential impact to the organization: MEDIUM timeframe to address: More than 12 months

Creating the strategic workforce plan

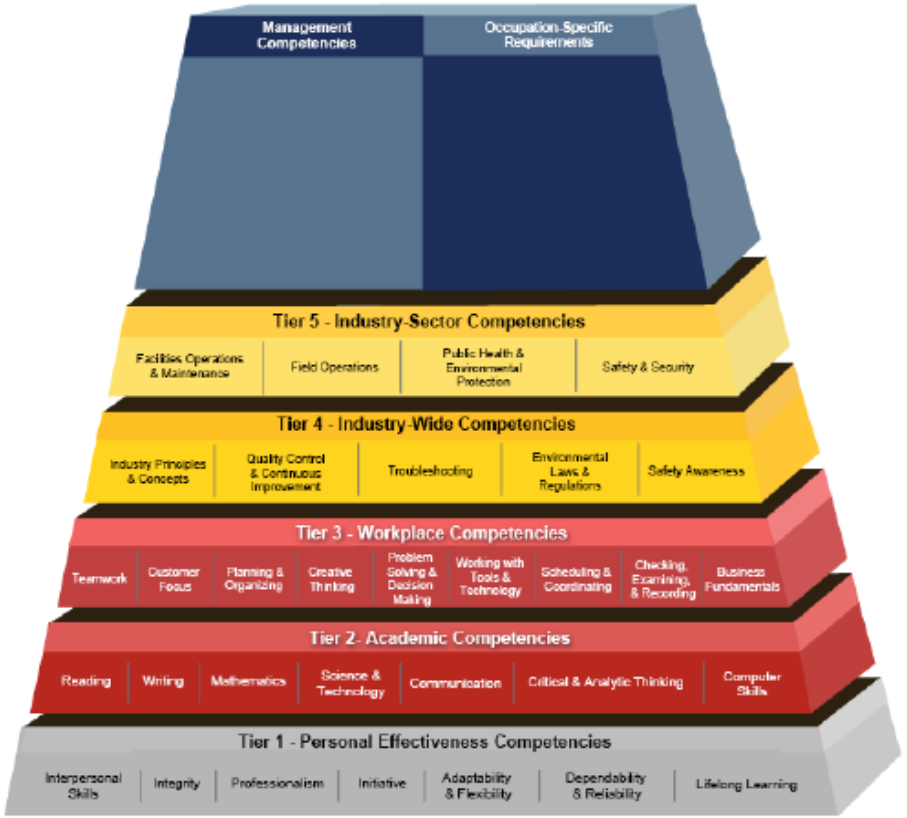
Step 2: Conduct a workforce gap analysis

Determine Core Competencies and identify top talent for succession

Identify top talent for succession

COMPETENCY MODEL CLEARINGHOUSE

Water and Wastewater Competency Model



Employment and Training Administration
United States Department of Labor www.doleta.gov

v. 2.1 Jan 2018

9-box grid template:

		Potential		
		Low	Growth	High
Performance	High	Key contributor	Emerging talent	Promotable
	Growth	Key contributor	Key contributor	Emerging talent
	Low	Action required	Improvement required	Improvement required

Creating the strategic workforce plan

Step 3: Prioritize extremely critical gaps

- Gap analysis may uncover high risk and high urgency findings
- Triage these items to avoid immediate negative impact to the organization
- Build consensus around what is truly high risk and high urgency

Question:

Thinking of your organization, what departments come to mind that have critical workforce planning needs?

A. Administration departments
B. Operations divisions
C. Finance or budgeting
D. Information technology
E. Other

Creating the strategic workforce plan

Step 4: Build the framework

Create aligned events, programs and documentation which addresses the gaps and everything else!

- Clearly defined recruitment strategy
- Succession planning process and cycle
- Talent development strategy, resources, budget and plan
- Employee retention strategy, resources, budget and plan
- Diversity, equity and inclusion strategy, resources, budget and plan
- Compensation strategy and market update plan
- Measuring success

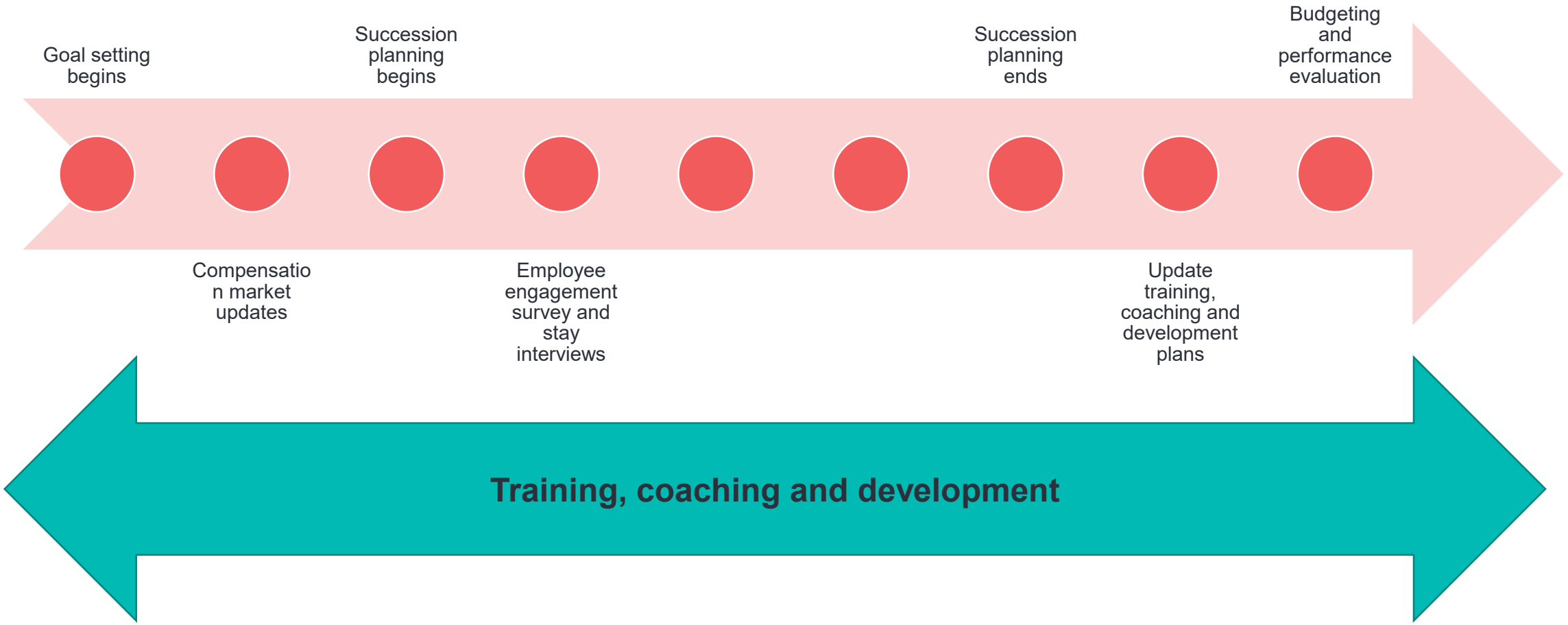
Creating the strategic workforce plan

Legend

0	Cannot perform this skill/is not familiar with this skill
1	Can perform this skill, regularly needing assistance
2	Can perform this skill, occasionally needing assistance
3	Is proficient in this skill, rarely needing assistance
4	Is proficient in this skill and can train others in this skill

		Function 1			Function 2			Function 3				
		Skill 1	Skill 2	Skill 3	Skill 1	Skill 2	Skill 3	Skill 1	Skill 2	Skill 3	Employee Average	Team Average
	Criticality	HIGH	MED	LOW	HIGH	HIGH	MED	LOW	HIGH	LOW		
	Employee 1	3	2	3	3	4	3	0	1	1	2	
	Employee 2	2	2	1	2	3	2	1	1	0	2	
Team 1	Employee 3	1	1	2	4	4	4	4	4	4	3	2
	Employee 4	0	0	0	2	2	2	1	1	1	1	
	Employee 5	2	3	3	3	3	2	1	2	2	2	
Team 2	Employee 6	3	3	2	3	3	3	2	1	2	2	2
	Employee 7	2	3	2	3	4	3	1	1	1	2	
	Employee 8	1	1	1	2	3	3	0	0	0	1	
Team 3	Employee 9	3	2	3	3	3	3	1	2	2	2	2
	Skill Average	**2**	**2**	**2**	**3**	**3**	**3**	**1**	**1**	**1**		
	Function Average	**2**			**3**			**1**				

Selected talent management best practices



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Article Series

- Workforce and succession planning – Part 1: getting started - Baker Tilly
- Workforce and succession planning – part 2: core competencies and top talent - Baker Tilly
- Workforce and succession planning – Part 3: training and competitiveness - Baker Tilly

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