

Supplementary guidance

Tools and resources to support agencies undertaking talent reviews.

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A set of supporting resources for people leaders and human resources (HR) teams that are involved in planning and participating in talent reviews are included as appendices to the Framework.

| Talent review cycle | Talent review steps | Appendices to the Framework |
|---------------------|---|--|
| Prepare | <ul style="list-style-type: none"> Prepare for talent review | <ul style="list-style-type: none"> Diversity and inclusion key questions |
| Identify | <ul style="list-style-type: none"> Agree focus areas Collect and collate talent data Understand individual's aspirations | <ul style="list-style-type: none"> Potential assessment Readiness assessment Conversation guide 1: Individual aspirations |
| Segment | <ul style="list-style-type: none"> Segment individuals Manager moderation Feedback and development planning | <ul style="list-style-type: none"> Conversation guide 2: Talent review moderation Conversation guide 3: Talent review outcomes |

Diversity and inclusion key questions

This is an example of questions to facilitate conversations around diversity and inclusion at each step of the talent review cycle. The questions below can help leaders, people managers and HR to ensure that talent reviews support diversity and inclusion in the public sector.

| Talent review step | Key questions |
|---------------------------------------|--|
| 1 Prepare for talent review | <p>Assess previous talent reviews</p> |
| 2 Agree focus areas | <ul style="list-style-type: none"> • Can we apply learnings from previous talent reviews to improve diversity and inclusion outcomes in this talent review cycle? <p>Assess previous talent reviews</p> <ul style="list-style-type: none"> • Are decisions on talent being made by a diverse and representative group of people? • Is there an independent member attending the talent review meeting to ensure the objective application of the talent identification criteria? |
| 3 Collect and collate talent data | <p>Purposefully consider diversity and inclusion</p> |
| 4 Understand individual’s aspirations | <ul style="list-style-type: none"> • Do our talent review practices consider individuals with a variety of skills, abilities, perspectives and experiences? • Have we considered individuals who require specific workplace support or use flexible working arrangements? |
| 5 Segment individuals | <p>Ensure objectivity of assessments</p> |
| | <ul style="list-style-type: none"> • Are assessments of individual performance and potential based on specific, measurable and observable behaviours and actions? • Can observations about individual behaviours and actions be demonstrated through examples? • Are we using different language to describe actions or behaviours of individuals who identify with a particular group? |

Talent review step**Key questions**

6 Manager moderation

7 Feedback and development planning

Review the diversity of identified talent

- Have we identified a diverse group of talent?
- Do the majority of individuals identified as talent fit within a particular group?
- Are there any skills, abilities, attributes and perspectives we might have overlooked?

Potential assessment

This is an example of a basic tool that can be used by leaders to assess an individual's potential. It includes 11 questions to assess engagement, ability, aspiration and leadership potential.

What is potential?

Potential is an individual's capacity to move into roles of greater complexity and scale, demonstrated through a combination of ability, engagement and openness to career progression.

The assessment of an individual's potential is a point in time assessment, it is not a destination. Individuals and leaders develop and change throughout their career. This means that an individual's potential may change over time.

Components of potential:

- Ability: Cognitive capacity; emotional intelligence; learns and adapts quickly; leadership ability.
- Engagement: Values driven; commitment.
- Openness: Motivation; openness to career progression; openness to leadership roles.

Instructions:

- Consider "How would you rate the employee in the following areas:". For each of the 11 statements, choose one of three response options: "Sometimes", "Often" or "Consistently".
- Circle / check the box that best describes the individual employee.
- Total the score to complete the assessment on the next page.
-

| Component | Characteristics of potential | Sometimes | Often | Consistently |
|------------------------------|--|-----------|-------|--------------|
| <i>Engagement</i> | <p>Values driven: Decisions and actions are guided by NSW public sector values of Integrity, Trust, Service and Accountability.</p> <p>If the response to this statement is “Sometimes”, the employee is assessed as ‘Low’ potential. Do not complete the remaining questions.</p> | 0 | 3 | 6 |
| <i>Leadership Engagement</i> | Commitment: Is motivated to deliver outcomes for the people of NSW. | 1 | 2 | 3 |
| <i>Ability</i> | Cognitive capacity: Effectively deals with complexity and ambiguity and applies analytical and strategic thinking in decision making. | 1 | 2 | 3 |
| <i>Ability</i> | Emotional intelligence: Demonstrates drive, energy, resilience and empathy. | 1 | 2 | 3 |
| <i>Ability</i> | Learning agility: Is able to learn, adapt, and apply new skills quickly. | 1 | 2 | 3 |

| Component | Characteristics of potential | Sometimes | Often | Consistently |
|---------------------------------------|--|-----------|-------|--------------|
| <i>Leadership Ability*</i> | Manage and Develop People: Engages and motivates staff, develops capability and potential in others. | 1 | 2 | 3 |
| <i>Leadership Ability*</i> | Inspire Direction and Purpose: Communicates goals, priorities and vision and recognises achievements. | 1 | 2 | 3 |
| <i>Leadership Ability*</i> | Optimise Business Outcomes: Manages resources effectively and applies sound workforce planning principles. | 1 | 2 | 3 |
| <i>Leadership Ability*</i> | Manage Reform and Change: Supports, promotes and champions sustainable change, and assists others to engage with change. | 1 | 2 | 3 |
| <i>Leadership Ability</i> | Inclusive Leadership: Supports and promotes a diverse, inclusive and accessible workforce | 1 | 2 | 3 |
| <i>Interest in career progression</i> | Exhibits a desire to contribute more and actively seek new opportunities in their field | 1 | 2 | 3 |

| Component | Characteristics of potential | Sometimes | Often | Consistently |
|---|---|-----------|-------|--------------|
| <i>Interest in leadership roles</i> | Interested in pursuing more complex roles with increased scope, influence and accountability. | 1 | 2 | 3 |
| Add the scores down each column | Subtotals | | | |
| Add the subtotals together | TOTAL SCORE | | | |
| Identify the overall result | OUTCOME | | | |
| Low Potential = 10-15 Medium Potential = 16-29 High Potential = 30-37 | | | | |

* Core leadership capabilities required by all leaders as identified in the People Management Capabilities within the NSW Public Sector Capability Framework. Capability can be assessed at specific level based on the role expectations of each individual or the levels expected of the cohort if this is relevant for the talent review.

Content assessment

This guide provides an overview of the key elements involved in assessing an individual’s readiness for role change as an outcome of talent review. The role change may be a lateral move for increased complexity or exposure to develop capability to prepare for an upwards move or upwards move within an organisation or a cross-sector mobility opportunity.

Readiness considers an individuals’ aspirations and other attributes, aligned with merit based criteria.

The questions below can help leaders, people managers and HR to assess an individual’s readiness:

- Does the individual have the required capabilities and experience to be successful in a new role / the proposed role?
- Does the individual have aspiration or interest to pursue a role change? If yes, do they want additional leadership responsibilities?

- Has the individual maximised the capability development opportunities from their current role?
- Is there a retention risk if this individual is not considered for a role change?

Conversation guide 1: Individual aspirations

This guide provides an overview of the key elements involved in having an effective meeting with your employee to understand their individual aspirations. It is important to understand individual aspirations as an input to talent review.

How to effectively understand your employee's individual aspirations

1. **Set the tone** – to ensure that employees feel supported in sharing their aspirations, create an environment which allows the conversation to be driven by employee needs. Convey that the purpose of the conversation is to understand how the employee is finding their current role, and what they aspire to in the future including if change is not a focus for them right now.
2. **Understand the employee's view on their current role** – ask questions to understand how satisfied the employee is in their current role. Understanding what motivates and makes the employee feel valued, and what they find both enjoyable and challenging in their current role will create the foundation for a more effective discussion of their future aspirations.
3. **Understand your employee's future aspirations** – ask questions to understand the employee's career aspirations and how they view their future in the organisation. Develop an understanding of your employee's short-, mid- and long-term goals, including whether they aspire to take on additional leadership responsibilities. Ask questions to test the reality of their aspirations and discuss what experiences will be helpful to meet their aspirations.
4. **Focus on development outcomes** – discuss with your employee what support or development opportunities they think they require to meet their career aspirations. Make it clear that their preferences will be taken on board, but won't be the sole determinant of talent review outcomes.

Conversation guide 2: Talent review moderation

This guide provides an overview of the key elements involved in facilitating an effective talent review moderation discussion.

How to facilitate an effective talent review moderation discussion

1. **Involve the right people** – Talent review meetings should be undertaken by a group of people to provide multiple perspectives. It should include people who have direct knowledge of the individuals nominated and an independent member, where possible, to ensure objectivity. Membership will change for different role levels and divisions, and between different cycles of talent review. Consider how members will be bound to confidentiality regarding confidential talent information shared with them including what is discussed at the meeting.

2. **Assign roles and responsibilities** – It can be helpful to assign specific roles for the talent review meeting. Four recommended roles are:
 - **Chair** - The Chair ensures that the Talent Review runs according to the guidelines, that there is full participation in the meeting, and that decisions are implemented. This role is best assigned to the one or two level up manager.
 - **Challenger** - The Challenger actively considers and encourages discussion. The Challenger also encourages the members to reflect on the diversity of the future leader candidates.
 - **Independent Member** – The Independent Member ensures the objective application of the talent identification criteria. This role is allocated to a person from outside the division, or far enough removed from those individuals being discussed. The Independent Member should change each review cycle to ensure continued objectivity.
 - **Note-taker** – The Note-taker captures discussion points and talent decisions and outcomes. These notes are confidential and for use by the people who attended the meeting to provide development feedback to their individual staff members and advice regarding the outcomes.
3. **Prepare** – All attendees collect and review talent data, understand individuals’ aspirations and segment individuals for discussion in advance of the meeting.
4. **Clarify purpose and focus areas** – The meeting opens with a statement of the purpose, desired outcomes and confidentiality protocols. This opening is completed by Chair. It is also an opportunity to frame the conversation with key focus areas for the organisation e.g. strategic priorities or critical roles.
5. **Focus on observable behaviour (not perception)** – During the meeting, a set period of time is allocated for a discussion about each individual to confirm segmentation based on assessment of performance and potential. Segmentation, assessments and discussion should always be provided with reference to specific actions/ behaviours. Avoid emotional remarks, generalisations or labels.
6. **Agree actionable outcomes** – Agree focus in role / development for key talent segments, and discuss the support they may need. The outcomes will be documented by the note taker, for action by leaders during talent review outcome conversations with their team members. Any decision made during the talent review meeting will not guarantee or limit an individual from being considered again in future.

Conversation guide 3: Talent review outcomes

This guide provides an overview of the key elements involved in debriefing talent review outcomes with an individual, based on principles of giving good feedback and being a good receiver of feedback.

How to debrief talent review outcomes

1. **Prepare** – Review talent review outcomes to ensure you are thoroughly prepared for the discussion. Ensure you balance positive and constructive feedback, and link back to the development opportunities that may be available to the individual.

2. **Be direct and clarify intent** –in the context of talent review, feedback should be provided to support the individual’s professional development needs and aspirations. State what you hope to achieve through debriefing talent review outcomes up front.
3. **Focus on observable behaviour (not perception)** – provide high-level feedback on how the employee has been assessed*, supported by specific examples or actions. Keep your comments objective and measured, even when providing positive feedback. Avoid emotional remarks, generalisations or labels.
4. **Discuss the outcomes** –connect the feedback with why it is relevant to the individual’s career planning or future development opportunities. Ask questions to confirm you and the individual are aligned, explore any issues and discuss solutions.
5. **Provide an opportunity for response** –it is important to ensure that there is opportunity for the individual to provide their perspective and respond to the talent review outcomes. In particular, make sure that you provide the individual an opportunity to discuss their own aspirations, including whether they hope to take on more leadership responsibilities in time.
6. **Seek actionable commitment** –discuss the steps the individual can take to improve, or continue to perform well in specific areas to inform development planning. Ask where you can help with their development, and discuss the support they may need. Provide an overview of next steps, including the timing of the next talent review cycle.

* Organisations leaders and HR teams should discuss and agree the organisation’s approach to the level of detail about talent segmentation outcomes that is shared with individuals during the debrief step. Consider the culture of the organisation when making this decision about your organisation’s practices.