

# Moving Toward Talent Management System Alignment: Eight Steps to Increase Coherence Among Talent Policies and Practices

## Talent Management Alignment Workbook

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### Authors

Matthew Finster  
Caitlin Beatson  
Jenna Scott

### Prepared for:



REGION 14  
Arkansas  
Louisiana  
Texas

### Prepared by:

Westat  
An Employee-Owned Research Corporation®  
1600 Research Boulevard  
Rockville, Maryland 20850-3129  
(301) 251-1500

## Region 14 Comprehensive Center

The Region 14 Comprehensive Center (R14CC) is one of 20 technical assistance centers supported under the U.S. Department of Education’s Comprehensive Centers program from 2019 to 2024. The R14CC serves the needs of Arkansas, Louisiana, and Texas by building capacity to improve policies and programs to improve student performance.

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# Table of Contents

<b>Region 14 Comprehensive Center</b>	<b>ii</b>
<b>Introduction</b>	<b>1</b>
Purpose	1
Getting Started	2
<b>Using the Workbook</b>	<b>3</b>
<b>Step 1: Assemble a Cross-Functional Team</b>	<b>5</b>
Instructions	5
Tips	5
Activity	6
<b>Step 2: Set a Vision and Goals</b>	<b>7</b>
Instructions	7
Tips	7
Activity	8
<b>Step 3: Analyze the Landscape</b>	<b>9</b>
Instructions	9
Tips	9
Activity	10
<b>Step 4: Prioritize Initiatives and Programs</b>	<b>11</b>
Instructions	11
Tips	11
Activity	12
<b>Step 5: Identify Desired Performance Competencies</b>	<b>13</b>
Instructions	13
Tips	13
Activity	14
<b>Step 6: Assess Focus and Fit</b>	<b>16</b>
Instructions	16
Tips	16
Activity	17

## Table of Contents (continued)

<b>Step 7: Zoom In and Zoom Out</b>	<b>24</b>	
Instructions	24	
Tips	24	
Activity	25	
<b>Step 8: Develop an Action Plan with Progress Metrics</b>	<b>30</b>	
Instructions	30	
Tips	30	
Activity	31	
<b>Tables</b>		
1	Key terms	4
2	Questionnaire for cross-functional team roles and responsibilities	6
3	State goals and role by talent management area	8
4	State policies and practices by talent management area	10
5	State-approved educator performance competency standards or frameworks	14
6	Additional educator performance competencies	15
7	Focus assessment	17
8	Fit assessment	20
9	Zooming in	25
10	Zooming out	26
11	Strategies to improve focus	28
12	Strategies to improve fit	28
13	Action plan for selected focus/fit improvement strategies	31
<b>Exhibits</b>		
1	Steps to increase talent management system alignment	3
2	Impact and feasibility matrix	12

# Introduction

## Purpose

The purpose of this workbook is to provide state education agencies (SEAs) with an eight-step process to align talent management practices. This workbook provides an overview of the eight steps and processes to assess the alignment of talent management policies and practices across multiple state-level programs and initiatives.

The workbook includes the following:

- **Step 1.** Assemble a Cross-Functional Team
- **Step 2.** Set a Vision and Goals
- **Step 3.** Analyze the Landscape
- **Step 4.** Prioritize Initiatives and Programs
- **Step 5.** Identify Desired Performance Competencies
- **Step 6.** Assess Focus and Fit
- **Step 7.** Zoom In and Zoom Out
- **Step 8.** Develop an Action Plan with Progress Metrics

Each step begins with a set of instructions, followed by some tips and an activity for state teams to engage in as small groups. Additional resources are provided for teams looking for a deeper dive into the material.

The goal of talent management systems is to recruit, prepare, select, place, induct, develop, compensate, and retain educators with the desired competencies to achieve the organization's vision for instructional quality. Strong alignment of talent management policies and practices is essential to achieve that goal.<sup>1</sup>

Strategic human resource management theory argues that the desired performance competencies must be embedded within talent management practices. In addition, talent management practices should work together in a mutually supportive and reinforcing way. That is, talent management practices should **focus** on desired performance competencies and **fit** with each other across areas.



Talent management system coherence is about **focus** and **fit**:  
How and to what extent talent management policies and practices:

- **Focus** on desired performance competencies; and
- **Fit** with each other in supportive ways.

<sup>1</sup> Heneman and Milanowski, 2004; 2011a; 2011b.

The process presented in the workbook is adapted from materials and literature on human capital management (HCM) systems and/or human resource alignment.<sup>2</sup> In this literature, focus is referred to as vertical alignment and fit is referred to as horizontal alignment. In this workbook, we use the terms **focus** and **fit**.

## Getting Started

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The eight steps detailed in this workbook are intended to assist SEAs (also referred to as *state teams*) or leaders to determine whether and how state-level talent management policies and practices focus on desired performance competencies and fit with each other rather than existing in silos. The workbook is meant to be completed over multiple sessions rather than in one sitting. In particular, Step 7, Zoom In and Zoom Out, is meant to be iterative and will take multiple meetings. In the first step, decide on an appropriate pace and schedule for your team.

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<sup>2</sup> In particular, Heneman and Milanowski, 2004; 2011a; 2011b; Kraemer et al., 2015; Milanowski and Heneman, 2017.

# Using the Workbook

Follow the eight steps displayed in Exhibit 1, described below, to increase the alignment of talent management policies and practices in your state. These steps guide SEA teams through the process of assessing the current state of alignment within and between the talent management practice areas, and developing recommendations for moving toward a more coherent system.

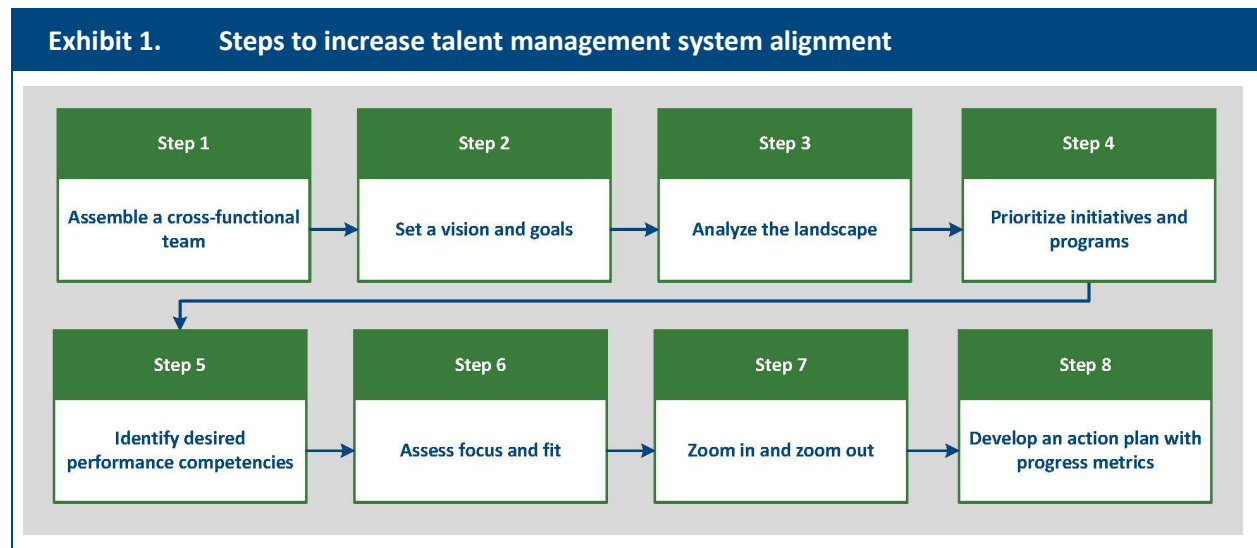


Table 1 defines key terms used throughout the workbook. SEAs may have slightly different definitions, and the terms may vary slightly across contexts. However, participants should review and be familiar with the terms to ensure common understanding of the language used throughout the workbook.

Table 1. Key terms	
Key terms	Definitions
Desired performance competencies	What educators need to know and be able to do in order to perform the job and implement the organization’s strategies. That is, the identified knowledge and skills for teachers to advance an organization’s strategy. Often defined by a framework or evaluation rubric, such as the Danielson Framework or the Marzano Focused Teacher Evaluation Model.
Fit	The degree to which practices work together to support each other across human capital management (HCM) components. Also referred to as <i>horizontal alignment</i> in the literature of strategic human resource management.
Focus	The degree to which an HCM practice focuses on the core competencies (e.g., teaching framework standards). Also referred to as <i>vertical alignment</i> in the literature on strategic human resource management.
Talent management	Strategically recruiting, preparing, selecting/hiring, inducting, deploying, developing, and retaining educators. Also referred to as <i>strategic human resource management</i> or <i>strategic human capital management</i> .
Talent management areas	<b>Recruitment.</b> Practices for recruiting individuals into the teaching profession via multiple pathways (e.g., traditional higher education, alternative certification, district-based preparation).*
	<b>Preparation.</b> Policies and practices for preparing and certifying aspiring teachers via multiple pathways (e.g., traditional higher education, alternative certification, district-based preparation).
	<b>Selection.</b> Methods and procedures for assessing whether job applicants possess the desired performance competencies and how final hiring decisions are made based on these assessments.
	<b>Placement.</b> Policies for assigning new hires to positions (e.g., schools, grades, subjects, classrooms) and policies that govern eligibility of current educators to transfer to other schools or positions.
	<b>Induction/Mentoring.</b> Information, training, and support provided to educators new to the district, school, or position.
	<b>Professional Development.</b> Practices and policies related to the content of professional development, how it is presented, who participates, and how well it addresses the desired performance competencies. Also referred to as <i>professional learning opportunities</i> .
	<b>Performance Management.</b> Performance evaluation policies and practices, which may include setting performance goals, observing and assessing performance, providing feedback and coaching, determining a summative evaluation rating, and planning support and recognition based on the results.
Talent management outcomes	<b>Compensation.</b> Policies and practices for setting salaries (base pay), making salary increases, providing bonuses for performance or stipends for taking on additional responsibilities or working in high-need schools; career pay progression; and the benefits provided.
	<b>Retention.</b> The processes involved in deciding which educators to retain and which to let go, either for performance reasons or due to a need to reduce staff levels.
Talent management outcomes	Acquisition, development, motivation, and retention of educators with desired performance competencies.

Source of definitions for talent management areas is Kraemer et al. (2015).

\* **Note:** The workbook focuses on recruitment into the profession. There is also recruitment at the local education agency (LEA) level that entails providing information about the specific job, desired performance competencies, performance expectations, and the organization to potential job applicants, as well as how job vacancies are announced and where and how the organization looks for educators with the requisite competencies.



# Step 1: Assemble a Cross-Functional Team

## Instructions

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You have to bring the “just right” people to the table and get them in the “just right” seats. Without these critical stakeholders’ contributions and championing, efforts may fall flat even if the subsequent steps are followed. Assemble and convene a cross-functional team with representatives from multiple offices within the agency. Explain the general purpose of the team, outline team member roles and responsibilities, establish timelines, and set meeting dates. Present and discuss the talent management concepts and terms (see Table 2). Consider developing a high-level (macro) talent management system alignment logic model to help define the purpose, scope, and activities of the team.

## Tips

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- A common challenge to developing talent management systems is managing work in silos or separate organizational departments; break down organizational silos by engaging stakeholders from offices across the agency (e.g., Human Resources, Curriculum and Instruction, Information Technology).
- To clarify the scope of work and theory of action, develop a logic model.
- Reconfirm commitment and support from top management for level of effort (based on scope of work and time commitment of the cross-functional team) to align talent management policies and practices.

## Activity

Table 2. Questionnaire for cross-functional team roles and responsibilities			
Question	Answer	Documentation	Relevant stakeholder(s)
How have you ensured that the team is representative of multiple departments?	Click or tap here to enter text.	<i>(Examples: Identification process and invitation announcement, stakeholder list)</i> Click or tap here to enter text.	Click or tap here to enter text.
How many members should be a part of the team?	Click or tap here to enter text.	<i>(Examples: Identification process and invitation announcement, stakeholder list)</i> Click or tap here to enter text.	Click or tap here to enter text.
What are team members' roles and expectations? Will there be a team "chair"?	Click or tap here to enter text.	<i>(Examples: Roles and responsibilities document, expected outcomes and/or product)</i> Click or tap here to enter text.	Click or tap here to enter text.
What is the scope of the team's authority? Is the team strictly advisory? Can the team make decisions?	Click or tap here to enter text.	<i>(Example: Decision-making criteria)</i> Click or tap here to enter text.	Click or tap here to enter text.
How often will the team meet? When?	Click or tap here to enter text.	<i>(Example: Schedule of meetings)</i> Click or tap here to enter text.	Click or tap here to enter text.
By what date will the team accomplish tasks and project milestones?	Click or tap here to enter text.	<i>(Example: Milestone schedule)</i> Click or tap here to enter text.	Click or tap here to enter text.
Is there a set of collectively determined norms for the team?	Click or tap here to enter text.	<i>(Example: Group norms document)</i> Click or tap here to enter text.	Click or tap here to enter text.

**Source:** Adapted from "Project Communication and Stakeholder Engagement" by J. Koppich, C. Rowland, D. Fireside, J. Keleher, and D. Wogan (2016).

<b>Additional Resources</b>	<ul style="list-style-type: none"> <li>Regional Educational Laboratory Pacific's Education Logic Model Tool (<a href="#">Education Logic Model - REL Pacific</a>) to help further articulate your theory of action.</li> <li>Additional resources on logic models created by the Institute of Education Sciences (IES) Regional Education Laboratories (RELs) are provided <a href="#">here</a>.</li> </ul>
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In Step 2, the cross-functional work group will work collaboratively to establish a vision for the state's talent management system, and develop goals to move toward the vision.

## Step 2: Set a Vision and Goals

### Instructions

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Develop a long-term desired vision and goals for the state’s talent management system. Collectively organize and establish goals through a visual mapping process. Define a “desired state,” first in broad terms and then with more specific behavioral descriptions—what will be seen and heard when the desired state is achieved?<sup>3</sup> Follow the subsequent steps to assess the “current” state and determine key factors for bridging the gap between the current and desired states.

### Tips

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- Since agency- and department-level strategic plans may contain talent management-related goals, begin by consulting existing documents to determine what goals/metrics have already been set to ensure alignment of additional goals developed by the cross-functional team.
- In particular, state Every Student Succeeds Act (ESSA) goals may contain talent management goals regarding recruiting more teachers in shortage areas, placing effective teachers in high-needs schools, equitable access to effective teachers, and retaining effective teachers.
- Consider developing goals for each talent management area or overarching goals for attracting, preparing, developing, supporting, and retaining talent.
- See additional resources below for examples of how state human capital management policies can be grouped by practice areas.

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<sup>3</sup> Garmston and Wellman, 2016.

## Activity

In Table 3, describe the current state, list key factors for change, and describe the desired state.

Table 3. State goals and role by talent management area			
Talent management area	Current state	Key factors for change	Desired state (Goals)
Recruitment	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Preparation	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Selection	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Placement	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Induction/ Mentoring	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Performance Management	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Professional Development	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Compensation	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Retention	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
<b>Additional Resources</b>	<ul style="list-style-type: none"> <li>For an example of how state policies in Indiana and Ohio were grouped by human capital resource management areas of preparation and licensure, recruitment, induction and professional development, and compensation, see <a href="#">State Policies on Human Capital Management: Indiana</a> and <a href="#">State Policies on Human Capital Management: Ohio</a>.</li> </ul>		

In Step 3, your team will review existing state-level policies and programs by talent management area as a means to move toward the desired state.

## Step 3: Analyze the Landscape

### Instructions

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To move toward the desired state (i.e., vision and goals) set in Step 2, it is essential to first reflect on the current state, or “landscape,” by organizing existing policies and programs by talent management practice area. Categorize state policies and practices by talent management practice area by completing Table 4. While many talent management practices are developed and administered at the district level, state policies may set minimum standards or provide guidance for local practices. The team should review and discuss the SEA’s role in the talent management areas based on the policies and practices.

### Tips

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- To make the conversation manageable, it may be helpful to first list programs, then add the corresponding policies and practices later.
- To identify relevant talent management areas, reflect on goals in Step 2. While SEAs may not typically consider all the talent areas within their purview, if the SEA has a goal that pertains to that area, the SEA should consider providing additional support and guidance in that area.
- Avoid naming broad initiatives (e.g., alternative pathways) composed of multiple specific policies or programs. Group policies and programs to the extent that they are similar.

## Activity

Table 4. State policies and practices by talent management area			
Talent management area	Goal(s)*	Program policies and practices	State education agency (SEA) role
Recruitment	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Preparation	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Selection	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Placement	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Induction/ Mentoring	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Performance Management	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Professional Development	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Compensation	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Retention	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

\* Use goal naming/numbering conventions from Step 2.

In Step 4, you will take the landscape analysis a step further and begin to prioritize state policies and programs based on their potential impact and feasibility.

## Step 4: Prioritize Initiatives and Programs

### Instructions

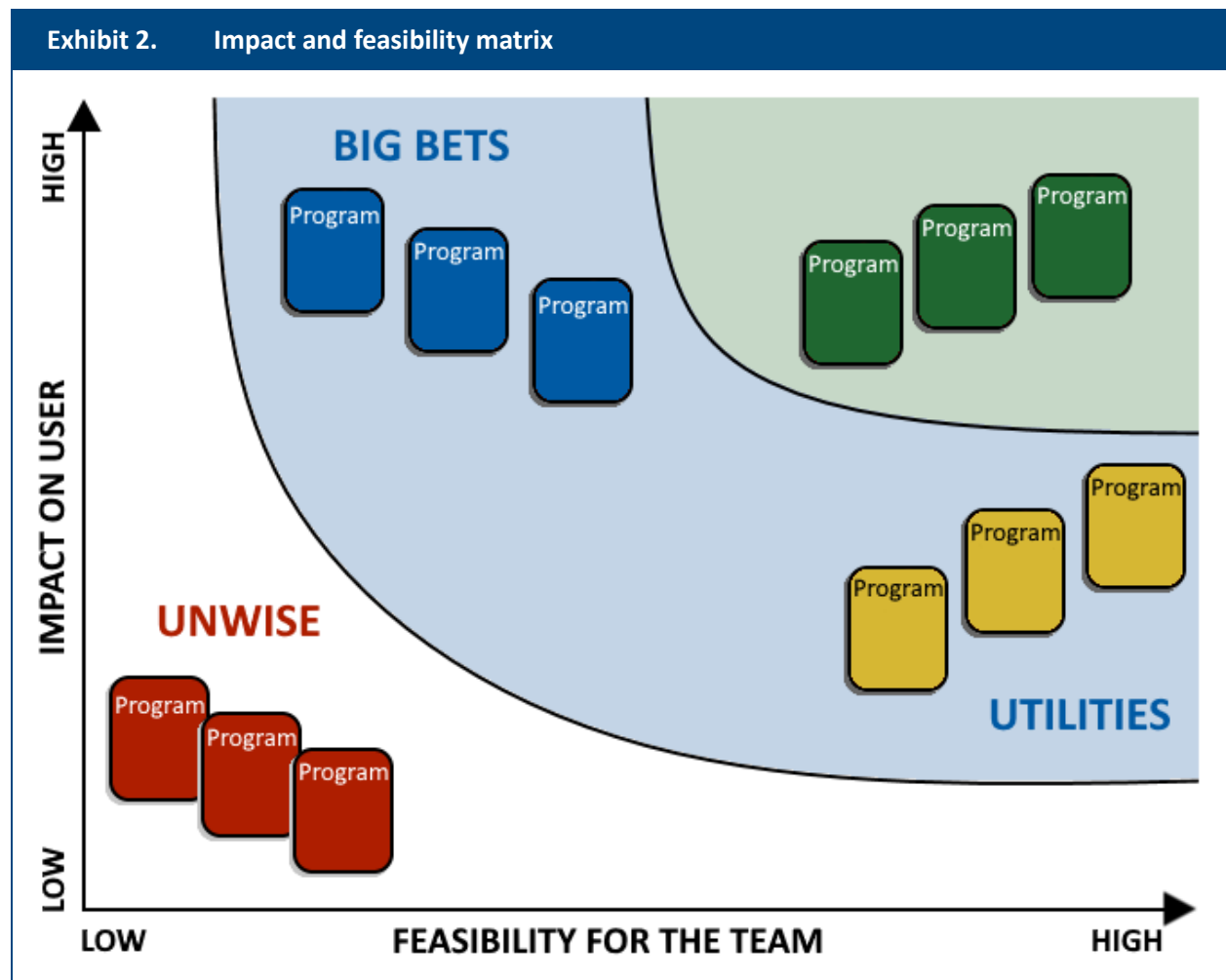
In this module, your team will prioritize state-level talent development efforts based on potential impact on the user (i.e., educators and students) and feasibility for the team to address. To facilitate this process, an Impact and Feasibility Matrix (Exhibit 2) is included below. The team should plot the state policies and programs by potential impact and feasibility to identify programs as no-brainers, big bets, utilities, and unwise.<sup>4</sup> The bottom left-hand corner represents the least important and the least feasible (most difficult); the top right-hand corner represents the most important and the most feasible (least difficult). Focus on one talent management practice area at a time, and evaluate each policy and program individually using the tips listed below. Roughly plot programs on the grid in accordance with the team’s discussion.

### Tips

- Identify policies and programs that are directly connected with the vision and goals determined in Step 2.
- It may be helpful for team members to do this individually first, then convene as a group to discuss the results and build consensus around which policies and programs should be prioritized based on impact and feasibility.
- Consider these elements when determining “ratings” for impact and feasibility:
  - **Mission.** To what extent does this program further the team’s mission and goals?
  - **Potential Uptake.** Are resources (e.g., human and structural capacity) immediately available for this program?
  - **Urgency.** Does this program address an immediate need, or is it an opportunity with a short timeframe?
  - **Logical Sequencing.** Does one program make sense to implement before others?
  - **Cost.** Is the program reliant on temporary funds, or is it funded from a recurring budget?
  - **Stakeholder Support.** How much interest in the program have key stakeholders demonstrated?
  - **Momentum.** Will the program give you early success? Credibility and visibility for your bigger plans?

<sup>4</sup> Adapted from IBM Enterprise Design Thinking Prioritization Grid: <https://www.ibm.com/design/thinking/page/toolkit/activity/prioritization>

## Activity



In the next step, your team will switch gears and identify desired educator performance competencies to improve student achievement. The competencies will be used in Step 6 to assess **focus**.



## Step 5: Identify Desired Performance Competencies

### Instructions

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Before assessing **focus**, state teams must identify the educator performance competencies needed to implement their strategies for improving student achievement. These competencies will serve as a measure for how focused a program or initiative is. Having the competencies in mind will help the team complete the talent management alignment activity.

### Tips

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- State or district evaluation systems likely already identify the desired educator performance competencies (e.g., Danielson Framework, Marzano Focused Teacher Evaluation Model).
- State teams may want to consider augmenting the desired performance competencies (e.g., incorporating remote teaching standards, such as [the Framework for Remote Teaching](#)) or identifying desired performance competencies for differentiated roles, such as teacher leaders.
- For available educator performance competencies models, see the paper [Review of Teaching Performance Assessments for Use in Human Capital Management](#).

## Activity

Identify existing state-approved performance competency standards or frameworks. List all relevant standards and frameworks and the key performance competencies defined within each in Table 5. An example is included below for the Danielson Framework for Teaching (2013). Determine any overlapping performance competencies across the standards/frameworks, and narrow the list accordingly.

Table 5. State-approved educator performance competency standards or frameworks	
Standards/ framework title	Educator performance competencies
Danielson Framework (2013)	<p><i>Domain 1: Planning and Preparation</i></p> <p><i>Component 1a: Demonstrating Knowledge of Content and Pedagogy</i></p> <p><i>Component 1b: Demonstrating Knowledge of Students</i></p> <p><i>Component 1c: Selecting Instructional Outcomes</i></p> <p><i>Component 1d: Demonstrating Knowledge of Resources</i></p> <p><i>Component 1e: Designing Coherent Instruction</i></p> <p><i>Component 1f: Designing Student Assessments</i></p> <p><i>Domain 2: The Classroom Environment</i></p> <p><i>Component 2a: Creating an Environment of Respect and Rapport</i></p> <p><i>Component 2b: Establishing a Culture for Learning</i></p> <p><i>Component 2c: Managing Classroom Procedures</i></p> <p><i>Component 2d: Managing Student Behavior</i></p> <p><i>Component 2e: Organizing Physical Space</i></p> <p><i>Domain 3: Instruction</i></p> <p><i>Component 3a: Communicating with Students</i></p> <p><i>Component 3b: Using Questioning and Discussion Techniques</i></p> <p><i>Component 3c: Engaging Students in Learning</i></p> <p><i>Component 3d: Using Assessment in Instruction</i></p> <p><i>Component 3e: Demonstrating Flexibility and Responsiveness</i></p> <p><i>Domain 4: Professional Responsibilities</i></p> <p><i>Component 4a: Reflecting on Teaching</i></p> <p><i>Component 4b: Maintaining Accurate Records</i></p> <p><i>Component 4c: Communicating with Families</i></p> <p><i>Component 4d: Participating in a Professional Community</i></p> <p><i>Component 4e: Growing and Developing Professionally</i></p> <p><i>Component 4f: Showing Professionalism</i></p>
Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.

Use the template in Table 6 to describe additional performance competencies if your team wants to consider augmenting the desired performance competencies (e.g., by incorporating remote teaching standards such as the Framework for Remote Teaching, or Culturally Responsive–Sustaining practices such as [NSYED CR-S Education Framework](#), or identifying desired performance competencies for differentiated roles such as teacher leaders using the [Teacher Leader Model Standards](#)).

Table 6. Additional educator performance competencies	
Performance competencies	Description
Competency 1	Click or tap here to enter text.
Competency 2	Click or tap here to enter text.
Competency 3	Click or tap here to enter text.
Competency 4	Click or tap here to enter text.
Competency 5	Click or tap here to enter text.
Competency 6	Click or tap here to enter text.

In the next step, using the performance competencies the team identified, the team will assess **focus** and **fit**.

## Step 6: Assess Focus and Fit

### Instructions

Use the Focus and Fit Alignment Rating activity below to rate and discuss the state's programs, policies, and practices on **focus** and **fit**. In addition to demonstrating potential linkages in an aligned talent management system, the tools provide information on state talent management alignment needs and can be used to generate ideas for improving talent management alignment. Open-ended focus and fit questions are also provided as an alternative to the rating assessments.

### Tips

**Reminder:** **Focus** refers to the degree to which an HCM practice focuses on the competencies. **Fit** refers to the degree to which practices work together to support each other.

- Alignment is about **focus** and **fit**. How well do educator-effectiveness programs, policies, or practices **focus on** or **incorporate** the performance competencies? How well do educator-effectiveness programs, policies, or practices **fit** or **tie together** with other talent management practice areas?
- A major takeaway from other HCM alignment work is the importance of identifying competencies, looking for them when hiring, and ensuring that they are developed and supported over educators' careers.<sup>5</sup>
- State teams should assess alignment for any of the talent management areas that have corresponding goals from Step 2.
- The activity generates a quick reading on the talent management policies and programs where change is needed most and provides an initial self-assessment of alignment that provides baseline data.
- The activity can also be used to generate ideas and recommendations to improve alignment in Step 7, Zoom In and Zoom Out.
- Prompts are included for the team to consider as part of the rating discussion.<sup>6</sup>

<sup>5</sup> Heneman and Milanowski, 2017.

<sup>6</sup> Prompts adapted from Heneman and Milanowski, 2011.

## Activity

Use Tables 7 and 8 to rate (using *not very well*, *somewhat well*, *well*, or *very well*) and discuss the **focus** and **fit** of state’s policies and programs.

Table 7. Focus assessment		
Focus questions	Rating	Notes about rating
How do recruitment policies and practices focus on recruiting individuals with the core competencies?	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Informing potential applicants about the competencies they are expected to have (such as in recruitment advertising or information on the state’s website)?</li> <li>• Targeting recruitment to sources where potential candidates with the competencies are most likely found?</li> <li>• Communicating the competencies expected of new teachers to the major teacher-training programs in your state?</li> </ul> <p>Choose an item.</p>	Click or tap here to enter text.
How do preparation policies and practices focus on developing teacher candidates with the core competencies?	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Aligning preparation programs’ curriculum and instruction with the core competencies?</li> <li>• Assessing candidates’ performance on the core competencies?</li> <li>• Providing opportunities for feedback and coaching on the core competencies (e.g., during residency programs)?</li> </ul> <p>Choose an item.</p>	Click or tap here to enter text.
How do selection policies and practices focus on selecting teacher candidates with the core competencies?	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Training for interviewers on the state’s desired competencies?</li> <li>• Assessing candidates on the competencies desired (e.g., in initial screening, central office or school interviews, reference checks, portfolio reviews)?</li> <li>• Selecting candidates with the highest level of the competencies or the highest potential to develop them?</li> </ul> <p>Choose an item.</p>	Click or tap here to enter text.

**Table 7. Focus assessment (continued)**

Focus questions	Rating	Notes about rating
<p><b>How do placement policies and practices focus on placing teachers with the core competencies in schools?</b></p>	<p><b>Prompt:</b> How well do policies and practices set standards or provide guidance for using the core competencies to place teachers in high-needs schools?</p> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>
<p><b>How do induction/mentoring policies and practices focus on developing teachers' core competencies?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Informing new hires about the competencies the state expects them to have or develop?</li> <li>• Induction activities that focus on developing the competencies?</li> <li>• Selecting mentors based on how well they have mastered the competencies?</li> <li>• Mentors to assess teaching practice using a rubric based on the competencies?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>
<p><b>How do performance management policies and practices focus on teachers' core competencies?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Designing and implementing an evaluation system that assesses the competencies?</li> <li>• Setting goals for teachers in terms of developing and demonstrating the competencies?</li> <li>• Providing feedback and coaching related to the competencies?</li> <li>• Providing remediation programs for struggling teachers to focus on helping them develop and demonstrate the competencies?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>

**Table 7. Focus assessment (continued)**

Focus questions	Rating	Notes about rating
<p><b>How do professional development policies and practices focus on developing the core competencies?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Providing professional development opportunities to help teachers develop all the competencies?</li> <li>• Providing professional development planning explicitly including an assessment of the competencies (e.g., using the findings from evaluation results to improve weak competencies)?</li> <li>• Conducting evaluation of professional development to gauge its relevance to the competencies before approving for funding or implementation?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>
<p><b>How do compensation policies and practices focus on rewarding individuals that have the core competencies?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Setting the level of starting pay and benefits offered to attract teacher job candidates with the desired competencies?</li> <li>• Rewarding teachers for developing the competencies with pay raises, bonuses, or other financial incentives?</li> <li>• Providing higher starting pay for teacher candidates who have especially high levels of the competencies?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>
<p><b>How do retention policies and practices focus on rewarding individuals who have the core competencies?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Using performance as a key criterion in layoff and/or reduction-in-force policies?</li> <li>• Providing retention bonuses for teachers that demonstrate high levels of competencies?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>

**Table 8. Fit assessment**

Fit questions	Rating	Notes
<p><b>How does the recruitment policies and practices fit with other talent management areas?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Designing recruitment efforts around desired competencies (the same ones as in the performance evaluation)?</li> <li>• Providing sufficient beginning teacher salary to attract a large enough number of enrollees in teacher preparation programs and/or alternative pathways, so that program/pathways can be selective?</li> <li>• Communicating (or promoting) professional development opportunities or growth in the profession during recruitment?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>
<p><b>How do preparation policies and practices fit with other talent management areas?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Producing a sufficient number of graduates to provide enough teacher candidates so that hiring can be selective?</li> <li>• Producing teacher candidates who demonstrate the desired competencies (the same ones as in the performance evaluation)?</li> <li>• Communicating opportunities for teacher candidates to advance in the profession without leaving the classroom?</li> <li>• Offering fiscal incentives for clinical experiences or residency teachers?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>
<p><b>How do selection policies and practices fit with other talent management areas?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Selecting educators with a high chance to develop the desired competencies, so that induction programs do not get bogged down with remediating poor performers?</li> <li>• Assessing potential teacher candidates on the desired competencies?</li> <li>• Providing teacher candidates with information about their professional development opportunities or growth in the profession?</li> <li>• Providing sufficient beginning teacher salary to attract a large enough number of applicants so that hiring can be selective?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>



**Table 8. Fit assessment (continued)**

Fit questions	Rating	Notes
<p><b>How do placement policies and practices fit with other talent management areas?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Placing new teachers in high-needs schools using information from the selection process (e.g., teachers with the desired competencies as identified in the selection process are placed in high-needs schools)?</li> <li>• Rewarding placement of effective educators in high-needs schools with short- and long-term incentives (e.g., incentives that encourage teachers to take assignments in high-needs schools)?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>
<p><b>How do induction/mentoring policies and practices fit with other talent management areas?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Tailoring or adapting an induction process to placement of new teachers (e.g., to address the specific needs and demands of the school(s) of assignment)?</li> <li>• Using information pertaining to the competencies from the selection/hiring process to inform induction/mentoring?</li> <li>• Aligning the competencies assessed in induction/mentoring as in the performance evaluation system?</li> <li>• Identifying desired competencies for further development through professional development opportunities?</li> <li>• Rewarding completion of induction programs with fiscal incentives (e.g., bonuses, larger percentage increase in salary)?</li> <li>• Induction programs that reduce turnover of promising beginning teachers?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>

**Table 8. Fit assessment (continued)**

Fit questions	Rating	Notes
<p><b>How do performance management policies and practices fit with other talent management areas?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Comparing teachers’ performance evaluations to results of the selection processes?</li> <li>• Using performance evaluation results to make decisions on the schools or positions (e.g., teacher leader roles) to which educators are initially assigned or can transfer to?</li> <li>• Using performance evaluation results to plan the professional development of individual educators?</li> <li>• Aligning the compensation systems with the performance evaluation system (e.g., progress on performance evaluation system is related to increases on salary schedule)?</li> <li>• Using performance evaluation results to inform retention decisions (e.g., performance is a significant factor in determining rights in layoffs or reductions in force)?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>
<p><b>How do compensation policies and practices fit with other talent management areas?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Providing sufficient beginning teacher salary to attract a large enough number of enrollees in teacher preparation programs and/or alternative pathways, so that program/pathways can be selective?</li> <li>• Providing fiscal incentives for residency teachers?</li> <li>• Placing effective educators in high-needs schools using short- and long-term fiscal incentives?</li> <li>• Rewarding completion of induction programs with fiscal incentives (e.g., bonuses, larger percentage increase in salary)?</li> <li>• Aligning the compensation systems with the performance evaluation system (e.g., progress on performance evaluation system is related to increases on salary schedule)?</li> <li>• Supporting continuation of professional development with fiscal incentives?</li> <li>• Rewarding teachers for key milestones in retention?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>

**Table 8. Fit assessment (continued)**

Fit questions	Rating	Notes
<p><b>How do professional development policies and practices fit with other talent management areas?</b></p>	<p><b>Prompts:</b> How well do policies and practices set standards or provide guidance for:</p> <ul style="list-style-type: none"> <li>• Providing school- or district-wide professional development opportunities that are informed by group performance evaluation results?</li> <li>• Providing teachers with professional development opportunities that are informed by results of individual performance evaluation?</li> <li>• Supporting continuation of professional development with fiscal incentives?</li> <li>• Providing teachers with opportunities to advance without leaving the classroom?</li> </ul> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>
<p><b>How do retention policies and practices fit with other talent management areas?</b></p>	<p><b>Prompt:</b> How well do policies and practices set standards or provide guidance for using performance evaluation results to inform tenure, termination, and reduction-in-force policies (e.g., performance is a significant factor in determining rights in layoffs or reductions in force)?</p> <p>Choose an item.</p>	<p>Click or tap here to enter text.</p>

<p><b>Additional Resources</b></p>	<ul style="list-style-type: none"> <li>• Regional <a href="#">Tools for Human Capital Management Alignment: Examples from Three TIF Grantees</a> provides human resource alignment tools from three Teacher Incentive Fund grantees that could be adapted to the state level to help begin a self-assessment of alignment.</li> <li>• <a href="#">Talent Management District Self-Assessment Checklist</a> is a tool that district teams can use to assess the usefulness of their talent management strategies.</li> <li>• <a href="#">Strengthening the Educator Workforce Through Human Resource Alignment</a> provides a human resource vertical and horizontal alignment assessment exercise that could be adapted to the state level.</li> <li>• <a href="#">Human Capital Framework for K-12 Urban Education: Organizing for Success</a> provides a human capital system self-assessment that includes a close review of components and cross-cutting issues.</li> <li>• <a href="#">Human Capital Management Alignment for Teacher Leadership Initiatives</a> provides talent management alignment reflection questions and a tool for differentiated roles such as teacher leaders.</li> </ul>
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In the next step, the team will move on to generating ideas to improve alignment by **zooming in** on specific programs by talent area and **zooming out** to examine the entire talent management system as a whole. **Step 7, Zoom In and Zoom Out, is meant to be iterative and will take multiple meetings.**

## Step 7: Zoom In and Zoom Out

### Instructions

In this step, teams will alternate between (1) zooming in on specific programs and corresponding policies and practices within talent management areas, and (2) zooming out to examine the entire talent management system as a whole. **Teams will need to go through multiple iterations of this process for all the prioritized programs. This step is the heart of the matter.**

Proceed by using Table 9 to zoom in on programs within a talent management area. Use the template below to provide a short description or list of ways that the programs' policies and practices **focus** on desired performance competencies. Also provide a short description or list ways the programs' policies and practices **fit** with each of the other talent management areas.

**Note:** Table 9 is designed to zoom in on preparation. Teams will need to adapt the table for other practice areas.

Next, use Table 10 to zoom out on programs' policies and practices across all the talent management areas. Using the information from zooming in, log the short descriptions or lists of ways that talent management programs' policies or practices focus on desired performance competencies. Also log the descriptions or lists of ways that talent management policies, programs, or practices fit with each of the other talent management areas.

Use this as an opportunity to identify potential ways that focus and fit could be improved within a talent management area. List potential strategies to improve **focus** and **fit** in Tables 11 and 12.

### Tips

- As part of the process, discuss which policies and practices should be tight (set centrally) or loose (allowing for more variation).<sup>7</sup>
- Refer back to the examples in the focus and fit assessment to include in the descriptions or recommendations, as applicable.

<sup>7</sup> DeArmond, Shaw, and Wright, 2009.

## Activity

Zoom in on policies and programs **within** a talent management practice area. Provide a short description or list of ways that preparation policies, programs, or practices **focus** on desired performance competencies. Also provide a short description or list ways preparation policies, programs, or practices **fit** with each of the other talent management areas. (**Note:** This template needs to be completed for each practice area.)

Table 9. Zooming in								
	Recruitment	Preparation	Selection and placement	Induction/mentoring	Professional development	Performance management	Compensation	Retention
Preparation	In what ways do preparation programs fit with recruitment practices?  Click or tap here to enter text.	In what ways do preparation programs focus on desired performance competencies?  Click or tap here to enter text.	In what ways do preparation programs fit with selection and placement practices?  Click or tap here to enter text.	In what ways do preparation programs fit with induction and mentoring practices?  Click or tap here to enter text.	In what ways do preparation programs fit with professional development practices?  Click or tap here to enter text.	In what ways do preparation programs fit with performance management practices?  Click or tap here to enter text.	In what ways do preparation programs fit with compensation practices?  Click or tap here to enter text.	In what ways do preparation programs fit with retention practices?  Click or tap here to enter text.

Zoom out on programs' policies and practices **across** all the talent management areas. Using the information from zooming in, log the short descriptions or lists of ways that talent management programs' policies or practices **focus** on desired performance competencies. Also log the descriptions or lists of ways that talent management policies, programs, or practices **fit** with each of the other talent management areas.

Table 10. Zooming out									
		Recruitment	Preparation	Selection and placement	Induction/mentoring	Professional development	Performance management	Compensation	Retention
		In what ways do talent management programs fit with other talent development practice areas?							
In what ways do talent management programs focus on desired performance competencies?	Recruitment	<b>Focus:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.
	Preparation	<b>Fit:</b> Click or tap here to enter text.	<b>Focus:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.
	Selection and placement	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Focus:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.
	Induction/mentoring	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Focus:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.

**Table 10. Zooming out (continued)**

		Recruitment	Preparation	Selection and placement	Induction/mentoring	Professional development	Performance management	Compensation	Retention
		In what ways do talent management programs fit with other talent development practice areas?							
<b>Professional development</b>  <b>Performance management</b>  <b>Compensation</b>  <b>Retention</b>	In what ways do talent management programs focus on desired performance competencies?	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Focus:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.
		<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Focus:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.
		<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Focus:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.
		<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Fit:</b> Click or tap here to enter text.	<b>Focus:</b> Click or tap here to enter text.

<b>Table 11. Strategies to improve focus</b>	
<b>Talent management area</b>	<b>Strategies for policy and program improvement</b>
<b>Recruitment</b>	Click or tap here to enter text.
<b>Preparation</b>	Click or tap here to enter text.
<b>Selection</b>	Click or tap here to enter text.
<b>Placement</b>	Click or tap here to enter text.
<b>Induction/ mentoring</b>	Click or tap here to enter text.
<b>Performance management</b>	Click or tap here to enter text.
<b>Professional development</b>	Click or tap here to enter text.
<b>Compensation</b>	Click or tap here to enter text.
<b>Retention</b>	Click or tap here to enter text.

<b>Table 12. Strategies to improve fit</b>	
<b>Talent management area</b>	<b>Strategies for policy and program improvement</b>
<b>Recruitment</b>	Click or tap here to enter text.
<b>Preparation</b>	Click or tap here to enter text.
<b>Selection</b>	Click or tap here to enter text.
<b>Placement</b>	Click or tap here to enter text.
<b>Induction/ mentoring</b>	Click or tap here to enter text.
<b>Performance management</b>	Click or tap here to enter text.
<b>Professional development</b>	Click or tap here to enter text.
<b>Compensation</b>	Click or tap here to enter text.
<b>Retention</b>	Click or tap here to enter text.



<p><b>Additional Resources</b></p>	<ul style="list-style-type: none"> <li>• <i>Zooming In and Zooming Out: Rethinking School District Human Resource Management</i> provides examples of rethinking human resource management by examining individual talent management practices and taking a more integrated view that encompasses the entire system.</li> <li>• For additional considerations, review the best practices by talent management components in <a href="#">Human Capital Framework for K-12 Urban Education: Organizing for Success</a>.</li> </ul>
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In the next step, the team will develop an action plan and identify progress metrics to monitor and analyze progress in the talent management areas.

## Step 8: Develop an Action Plan with Progress Metrics

### Instructions

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Develop an action plan to implement select focus/fit improvement strategies. SEAs may use metrics to monitor and analyze progress in the talent management practice areas. Use Table 13 to list potential talent management metrics.

### Tips

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- Consider developing a logic model to monitor talent management activities on talent management outputs and outcomes.
- For example progress metrics, see [Introduction to Human Capital Management System Dashboards](#).
- To track the implementation and effectiveness of investments in talent management, consider developing a talent management dashboard to display related metrics.

## Activity

<b>Table 13. Action plan for selected focus/fit improvement strategies</b>			
<b>Selected Focus/Fit Improvement Strategy</b> <i>List a focus/fit improvement strategy that your team will implement. (Use a separate form for each strategy.)</i>			
<b>Action steps</b> <i>List the action steps required to implement the selected strategy. Add more action steps as needed.</i>	<b>Responsible team members</b> <i>Which team member(s) will lead implementation of each action step?</i>	<b>Timeline</b> <i>When will you begin and accomplish each action step?</i>	<b>Status</b> <i>Identify the status of the action steps for each strategy (e.g., not started, in progress and on track, behind schedule, completed).</i>
<b>Action Step 1:</b>	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
<b>Action Step 2:</b>	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
<b>Action Step 3:</b>	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
<b>Action Step 4:</b>	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
<b>Action Step 5:</b>	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

**Table 13. Action plan for selected focus/fit improvement strategies (continued)**

Selected Focus/Fit Improvement Strategy			
<i>List a focus/fit improvement strategy that your team will implement. (Use a separate form for each strategy.)</i>			
Action steps	Responsible team members	Timeline	Status
<i>List the action steps required to implement the selected strategy. Add more action steps as needed.</i>	<i>Which team member(s) will lead implementation of each action step?</i>	<i>When will you begin and accomplish each action step?</i>	<i>Identify the status of the action steps for each strategy (e.g., not started, in progress and on track, behind schedule, completed).</i>
Resources Required for Selected Focus/Fit Improvement Strategy			
<i>What resources (e.g., people, time, money) will you need to successfully implement this strategy?</i>			
Click or tap here to enter text.			
Progress Metrics for Selected Focus/Fit Improvement Strategy			
<i>How will you know if you're on track for success?</i>			
Current state: Click or tap here to enter text.			
Desired state (goal): Click or tap here to enter text.			

<b>Additional Resources</b>	<ul style="list-style-type: none"> <li>• <a href="#">Introduction to Human Capital Management System Dashboards</a> provides an overview of the development of human capital management system (HCMS) dashboards, an example of a comprehensive strategic dashboard, and a summary of 12 steps to consider in developing dashboards.</li> <li>• <a href="#">Enabling business results with HR “Measures that matter”</a> provides a description of approaches to human resource measurement, including reports, dashboards, and scorecards.</li> <li>• <a href="#">Utilizing Integrated Resources to Implement the School and District Improvement Cycle and Supports: Guidance for Schools, Districts, and State Education Agencies</a> provides a practical guide for developing a cohesive system of support for state education agency (SEA), local education agency (LEA), and school improvement that could be used to implement talent management alignment recommendations.</li> </ul>
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