Succession Planning

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What is Succession Planning?

- A process for

    - Ensuring a supply of highly qualified candidates

    - Identifying critical positions and their competencies and anticipating gaps

    - Knowledge transfer

    - Ensuring that supportive strategies are in place to retain and fully engage employees

Long-range cost-savings

Why is Succession Planning Important?

- Baby Boomer retirements
- Demographic and labor market trends which are contributing to skill shortages
- Need to develop ability to compete successfully for scarce talent

Critical Positions

WHAT IS A CRITICAL POSITION?

- Instrumental for delivery of the organization's commitments and priorities
- Exert a critical influence on achieving operations and strategic goals

WHY SHOULD WE IDENTIFY THEM?

- Prioritize allocation of resources and focus efforts where they are most needed
- Ensure leadership continuity
- Ensure strategic and operational capacity is sustained

FACTORS TO TAKE INTO CONSIDERATION

- Organizational impact
- Likelihood of a vacancy
- Difficulty to fill
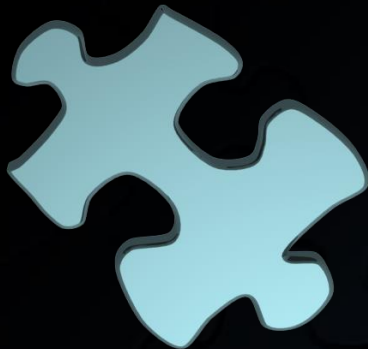- Loss of "institutional memory"

Succession Plan Objectives

- Identify critical positions and develop a pool of potential successors

- Encourage a culture that supports knowledge transfer and employee development

- Build human resource programs that attract and retain qualified individuals

- Implement a framework that identifies the competency requirements of

    critical positions, assesses

    potential candidates, and

    develops required

    competencies
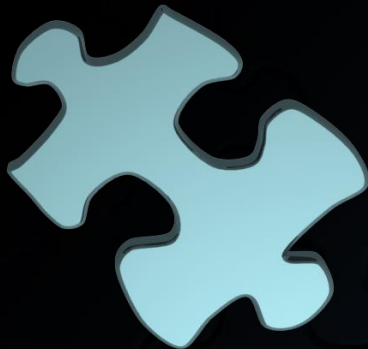
Succession Plan Guiding Principles

- Support the mission, vision, and values of the organization
- Conduct in accordance with the policies and procedures of the organization
- Strike a balance between the values of fairness, accessibility, transparency, and efficient use of government resources for current and future needs
- Assess candidates using competency-based methods free from favoritism
- Communicate openly and transparently
- Align with current and future strategic plans

How its done

5. Evaluate Effectiveness

1. Identify Critical Positions

2. Identify Competencies

3. Identify Succession Management Strategies

4. Develop and Implement Succession Plans

Components

PLANNING

- Employee Driven
- Input from Managers
- Project team develops tracks, designs classes, & advertises program

FRAMEWORK

- Four tracks: Administrative; Supervisory; Professional/Technical; Senior Staff
- Nominations or self referrals for participation
- Recommendations from supervisors + 1
- Participation approved by senior mgmt.
- Limited to 72

IMPLEMENTATION

- Year 1 – Class work
    - Participants
        - Interactive class work ranging from 40 hours to 96 hours
    - Mentors
        - Interactive class work – 24 hours
- Year 2 – Required Mentoring with shadowing
- Year 3 – Optional Mentoring

Unique Elements

- Depth and breadth of class work for participants and mentors
- Use of various inventories such as DiSC, MBTI, Strength Finders, IAT, and Emotional Intelligence
- Length of program
- Number of participants
- Repetition of cycle
- Emphasis on creating mentor-mentee pairings between different departments
    - Networking
    - True mentoring rather than coaching
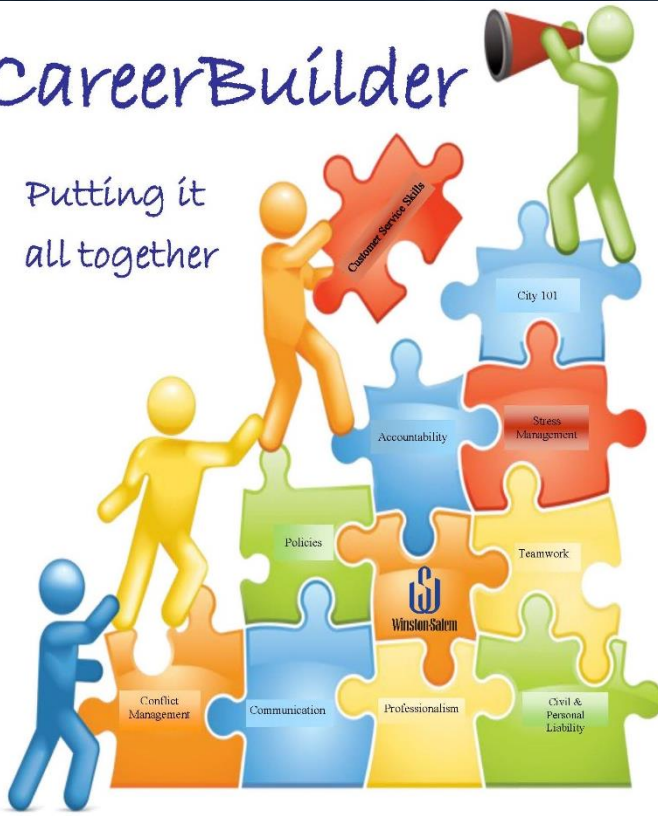- Job shadowing requirements

How do we know it works

- Program evaluation

- Participant promotions

- Program demand – participants and mentors

- Requests to use components of the program
  as mini-training programs for departments

- Support of management

- Acknowledgement of program by other
  organizations

CareerBuilder