

# Passing the Baton: Municipal Succession Planning

Presented by

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Employee Assistance Program (EAP)

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# Agenda

- Defining Succession Planning
- Needs Assessment for your Town
- Town of Andover – case example
- Succession Planning model:

**2020 \_\_\_\_\_ Vision: Seeing our Future**

- Seeing our Future Exercise

# Definition of SP

SP is **not** identifying a specific employee for a specific job at a future point in time.

Instead ... it is:

- Identifying key player gaps through workforce planning
- Giving employees at all levels opportunities to develop their skills
- Embedding development opportunities in everyday work processes
- Embedding knowledge sharing into work processes
- Developing many employees for more challenging positions; not just one

# What is your temperature?

**Hot:** It's urgent – “We need to take steps now to address SP.”

**Lukewarm:** “SP is important but we don't have time to spend on it right now”

**Cold:** “SP is just not important right now. Maybe it will be later.”



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# Retire

Definition:

- To withdraw from action or danger
- To withdraw especially for privacy (retire to her room)
- To move back
- To withdraw from one's position or occupation
- To go to bed

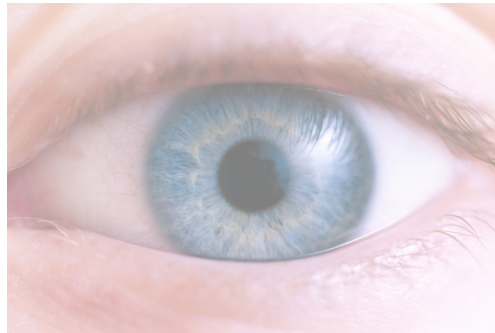
Baseball sense – to put out (1874)

# SP is HR Strategy

1. Gather workforce Data
2. Assess Data
3. Determine Labor Sources
4. *Develop Strategies*

***2020 (town name) Vision: Seeing our Future***

# Phase 1 - Envisioning



1. **Task:** Convene a 2020 Team to spearhead initiative  
**Who:** Key stakeholder(s)
2. **Task:** Conduct Needs Assessment (see form within packet)  
**Who:** 2020 Team
3. **Task:** Meet to develop 2020 Vision  
**Who:** 2020 Team and Select Board  
*Objective for session(s): How do we want the town to operate in 2020? Overarching direction for town is clarified.*  
*(MIIA EAP is available to facilitate task.)*

# Phase 1 - Envisioning

4. **Task:** Obtain 2020 Vision information

**Who:** 2020 Team invites Dept Heads to talk w/ their boards and staff and gather 2020 Vision info. The following questions are intended to guide the process:

- What will our Department look like in 2020?
- How will it function differently?
- What do you imagine the staffing will look like?
- What will technology and industry standards be like in 2020 and how will this change the operation?
- How will our work groups function differently?

*(MIIA EAP is available to facilitate task.)*

5. **Task:** Department Heads report Vision information

**Who:** 2020 Team meets with Department Heads to gather Town Department Vision information..

*(MIIA EAP is available to facilitate task.)*



# Phase 1 - Envisioning

**6. Task: Develop Townwide 2020 Vision**

**Who: 2020 Team**

*(MIIA EAP is available to facilitate task.)*

**7. Task: Share 2020 Vision with all employees**

**Who: 2020 Team presents 2020 Vision to town**

*(MIIA EAP is available to facilitate task.)*

**8. Task: Goal setting to achieve 2020 Vision**

**Who: 2020 Team and Department Heads meet regularly to set department goals in alignment with 2020 Vision.**

*(MIIA EAP is available to facilitate task.)*

- Who: 2020 Team facilitates this data collection and posts to an intranet site.***

- Who: Employees submit responses to 2020 Team which facilitates this data collection and posts to the intranet.***

# Phase 3 – Preparing your Talent

- 1. Task: Implement “Tapping (town name) Talent”, an internal Strategy to create a learning culture and inspire employee development. (See “Tapping (town name) Talent”, packet for template.)***

***Who: 2020 Team coordinates program.***

*MIIA EAP is available to facilitate task.*



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# Seeing our Future Exercise

1. What will your Department look like in 2020?
2. How will it function differently?
3. What do you imagine the staffing will look like?
4. What will technology and industry standards be like in 2020 and how will this change the operation?
5. How will your work groups function differently?