

Succession Planning Tips to Achieve Unity Through Diversity

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Discussion Points

- What is Succession Planning?
- Why is it important?
- Who should complete the plan?
- What are the elements of a good plan?
 - Aligning Plan to Achieve Strategic Organizational Goals
- Wrap up



Succession Planning Definition

Succession Planning:

A process for identifying and developing <u>internal people</u> with the potential <u>to fill key leadership positions</u> in the organization. Succession planning increases the availability of experienced and capable employees that are prepared to assume these roles <u>as they become available</u>.



Why develop a Succession Plan? Why is it important?



Importance of Succession Planning

- Allows for the transfer of Institutional Knowledge
- Ensures the Continuity of Operations
- Ensures Efficiency of Operations
- Reduces Exposure and Liability
- Assists in preserving the Bond Rating Moody's
- Positions organization to become an "Employer of Choice"
- It supports Employee Development and Retention
- Recognizes and respects the Expertise and Longevity of Incumbent Employees
- It's Fiscally Prudent to do so!



Succession Planning Team

- Incumbents
- Key Management Staff Managers and Department Heads/Directors
- Human Resources
- Supervisors and Employees
- Other Stakeholders
 - Board/Committee/Commission Members
 - Community Groups
 - Peers



Role of HR, HR, HR

- Human Resources is a key member of the Succession Planning Team
 - Keeper of employee data all types demographics, training, performance review
 - Lead advisor for employee recruitment, development and retention strategies
 - Has access to information and resources that can assist in developing the succession plan and ensuring its success – such as training programs, etc.



Succession Planning Key Elements

- Clear expectations of outcomes to be achieved
- Aligning Succession Plan goals with organizational goals
- Understanding of external environment demographics and the availability of talent
- Inclusion of innovative alternative methods for staffing
- Commitment to Employee Development
- Commitment to Employee Retention
- Workforce analysis
- Transfer of Institutional Knowledge



Aligning with Organizational Goals -Cambridge

- General goals:
- Proactively build "bench strength", so employees will be able to seamlessly step into key roles and meet the challenges of moving from peer to supervisor.
- Attract and retain talented employees.



Aligning with Organizational Goals -Cambridge

To Achieve Unity Through Diversity

- Create and foster an environment in our organization where department heads, managers, and staff can utilize cultural similarities and differences to enhance interacting with the community, customers, and co-workers.
- Build the cultural competency skills and effectiveness of employees and enhance the leadership capacity throughout all City departments.
- Develop effective management and mentorship of a diverse workforce.



Workforce Analysis

- <u>Review</u> present workforce and organizational objectives

 upcoming retirements and strategic initiatives
- <u>Identify</u> future workforce needs up and coming issues mission critical positions – core competencies
- <u>Analyze</u> present and future needs to identify gaps or surplus – review/update job descriptions
- <u>Develop</u> and <u>Implement</u> Human Resources strategies and plans – employee recruitment, development and retention
- Evaluate, monitor and adjust plan



Workforce Review - Global

- Age Demographics of Available Workforce:
 - 80 million Baby Boomers were born between 1946 and 1964 (ages 54 to 72)
 - 46 million Generation X-ers were born between 1965 and 1981 (ages 37 to 53)
 - 76 million Millennials were born between 1982 and 2000 (ages 22 to 36)



Workforce Review - Local

- Complete employee census to determine which positions may be vacated in the next five years
- Survey employees to determine interest in moving into different positions career goals?
- Survey incumbent employees about competencies needed to perform work
- Survey Directors/Department Heads/Managers about potential employees to fill positions
- Review organizational goals and strategic initiatives to determine if other positions are needed and who will be targeted to fill them – skill set/diversity



Identify Future Workforce Needs

- What issues are coming down the pike?
 - Federal and state mandates that affect staffing
 - Consolidation of services
 - Financial health of the jurisdiction
 - Community issues
- Which positions or tasks are mission critical?
 - Positions or Tasks!



Survey Response – N = 51 Anticipate Vacancies – Next 5 Years



ANSWER CHOICES	RESPONSES	
Yes	92.16%	47
No	7.84%	4
TOTAL		51

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Administrative Support

- Administrative Assistants
- Financial Support Staff
- Village Clerks
- Purchasing

Human Services

- Cultural Services
- Teen and Early Childhood Services
- Nurses



Finance, Human Resources and Information Technology

- Directors Finance, IT and HR
- HR Assistants
- Benefits and Risk
- Accountants
- Purchasing
- Revenue Manager
- Water Billing
- Applications Development and Support
- Technical Specialists



Community Development

- Inspectors
- Planners and Plan Reviewers
- Code Compliance

Public Works

- Directors
- Engineers
- Water/Sewer
- Maintenance Workers
- Mechanics



- Public Safety
 - Chiefs Fire and Police
 - Deputy Chiefs Fire and Police
 - Commanders
 - Lieutenants
 - Captains
 - Sergeants
 - Patrol Officers
 - Firefighters
 - Accreditation



Survey Response – N = 51 Mission Critical Positions





Survey Response – N = 52 Alternative Staffing Models



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Workforce Needs Alternative Staffing Models Used

- Job Sharing
- Outsourcing/Contracting Work
- Part-time Employees
- Temporary Employees
- Interns
- Cross training



Analyze Present and Future Needs

- Where are the gaps?
- Where is the surplus?
- Review of job descriptions:
 - Summary
 - Essential Functions
 - Qualifications and Experience
 - Physical Demands and Working Conditions



Knowledge Transfer Assessment

- Update job responsibilities
- Update education and training
- Update Years of experience
- Consider alternative staffing
- Document meeting responsibilities
- Document ongoing projects
- Document electronic information
- Update equipment needs
- Update physical demands and working conditions
- Request transition assistance



Summary

- What is Succession Planning?
- Why is it important?
- Who should complete the plan?
- What are the elements of a good plan?
 - Aligning Plan to Achieve Strategic Organizational Goals Cambridge example
- Wrap up



Let me know if we can help...

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