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Can I Work From Home? Succession Planning Post-Pandemic

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Discussion Points

- Importance of Succession Planning
- Who should complete the Succession Plan and what are the components of a Succession Plan?
- Succession Plan Steps – Workforce Analysis, Alignment to Strategic Initiatives, Assess Workforce Interest/Readiness and Potential
- Employee Development
- Employee Retention Strategies

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 – Pre-Covid

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



Succession Planning Team – Post-Covid

- **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 Plan Components – Pre-Covid

- Expectations and Outcomes
- Organization's Strategic Initiatives
- External Market/Upcoming Needs (5 Years)
- Vacancies, Mission Critical and Readiness
- Alternative Staffing Models
- Assess Workforce Interest/Readiness and Potential
- Intuitional Knowledge Transfer Assessment
- Employee Development Plan
- Employee Retention Plan

Succession Plan Components – Post-Covid

- Expectations and Outcomes
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 - Employee Retention Plan
-

Workforce Review - Local



Determine which positions may be vacated and what issues the organization will face in the next five years



Survey incumbent employees to determine interest in moving into different positions – assess 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 program that affect staffing

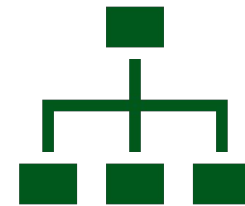
Consolidation of services

Financial health of the jurisdiction

Community issues

Post COVID

Economy



Which positions or tasks are mission critical?

Positions or Tasks!

Analyze Present and Future Needs



Where are the gaps?

Consolidate Services
Eliminate Services



Where is the surplus?

Capacity to Insource
Desire to Outsource
Share Services



Review of job descriptions:

Summary
Essential Functions
Qualifications and Experience - DEI
Physical Demands and Working Conditions


Workforce Review – ~~Department Head Survey~~


- Department Name
- Do you anticipate vacancies in your department within the next five years?
- If yes, please list the position titles and how many vacancies in each title you will experience?
- Do you have staff that are ready to move into vacant positions?
- Would you consider any of the previously listed positions “Mission Critical”, meaning they **must** be filled should a vacancy arise?
- If yes, list the position titles.
- Have you implemented alternative staffing methods in your department?
- If yes, what methods have you used?
- Do you think any of your “Mission Critical” positions could be filled by using alternative staffing methods?
- Are your staffing needs going to change, based on your Department’s Strategic Initiatives?
Please explain in detail.

Workforce Needs Alternative Staffing Models Used

 Job Sharing with Colleagues or Communities

 Outsourcing/Contracting Work

 Phasing Retirement

 Interim or Project Work

 Temp-to-Hire

 Mentoring Talent

Workforce Review - Census

Succession Planning Worksheet – Workforce Census

| Position Title | Incumbent Name | Retirement Status | Mission Critical | Position Readiness | Alternative Staffing | | Staff Ready | | Strategic Initiatives |
|----------------------------------|----------------|---------------------------|------------------|--|----------------------|------------|-------------|-------------|-----------------------|
| | | | | | Option | Method | Now | 1 - 2 Years | |
| Police Chief | John Smith | A | Y | A | No | | 2 | 3 | Internal Hire |
| Firefighter | Jane Doe | A | Y | B | No | | 0 | 0 | Diversity |
| Economic Development Coordinator | | | | | Yes | Consultant | 0 | | New Position |
| Engineer | Michael Jones | B | Y | A | Yes | Outsource | 1 | | |
| Water Superintendent | Nancy Gray | | Y | | No | | 0 | 0 | |
| | | Retirement Status: | | Position Readiness: | | | | | |
| | | A: Within 1 year | | A: Fully trained upon hire/promotion | | | | | |
| | | B: Within 3 years | | B: Fully trained within 1 year of hire/promotion | | | | | |
| | | C: Within 5 years | | | | | | | |

Assess Workforce Potential/Interest = **Employee Retention**



Directors/Department Heads, Managers

Complete Talent Pool Nomination Form
Complete Talent Pool Nomination
Summary



Employees

Complete Talent Pool Applicant Profile
Form

Assess Workforce Potential

□ Talent Pool Nomination Form

| Leadership Area | Exceeds Expectations | Meets Expectations | Does Not Meet Expectations |
|--|--------------------------|--------------------------|----------------------------|
| Support of Agency Values | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Behaves Consistently with values | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Displays respect for others | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Is a good team player | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Identifies with management | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Leadership Promise | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Is motivated to lead | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Accepts leadership responsibility | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Mobilizes resources/people to action | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Leads teams that have high morale | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Assess Workforce Potential

□ Talent Pool Nomination Form

| Leadership Area | Exceeds Expectations | Meets Expectations | Does Not Meet Expectations |
|--|--------------------------|--------------------------|----------------------------|
| Interpersonal Skills | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Communicates clearly and effectively | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Makes effective presentations | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Demonstrates diplomacy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Is trusted and respected | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Demonstration of Results | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Shows positive team/unit results | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Displays objective indicators of success | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Accomplishes major assignments | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Assess Workforce Potential

□ Talent Pool Nomination Form

| Leadership Area | Exceeds Expectations | Meets Expectations | Does Not Meet Expectations |
|---|--------------------------|--------------------------|----------------------------|
| Developmental Orientation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Has accurate self-insight | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Is coachable; accepts feedback | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Has history of learning from experience | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Quickly learns new tasks | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Self-initiates development activities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Adapted from Byham, William C., Audrey B. Smith, Matthew J. Paese. 2002. *Grow Your Own Leaders. Acceleration Pools: A New Method of Succession Management*. Upper Saddle River, NJ: Prentice-Hall Inc. (Form via: CPS Human Resource Services)

Assess Workforce Potential

□ Talent Pool Nomination Summary

| Name | Support of Agency Values | Leadership Promise | Interpersonal Skills | Demonstration of Results | Developmental Orientation |
|-----------------|--------------------------|--------------------|----------------------|--------------------------|---------------------------|
| Anna Patel | A | A | B | A | B |
| Jordan Peterson | B | B | A | A | A |
| Harold Price | B | B | B | B | B |
| Mark Rodgers | C | B | B | C | C |

A = Exceeds Expectations

B = Meets Expectations

C = Does Not Meet Expectations

Assess Workforce Interest = Employee Retention

□ Talent Pool Applicant Profile

| | | | |
|-----------------------------|---------|----------------|--------|
| Employee Information | | | |
| Name: | | | |
| Title: | | | |
| Job Classification: | | | |
| Length of Service: | | | |
| Time In Current Job: | | | |
| Current Supervisor: | | | |
| Career Goals | | | |
| 1 to 3 Years: | | | |
| 3 to 5 Years: | | | |
| Beyond 5 Years: | | | |
| Educational History | | | |
| Institution: | Degree: | Area of Study: | Years: |
| Institution: | Degree: | Area of Study: | Years: |
| Institution: | Degree: | Area of Study: | Years: |

Assess Workforce Interest = Employee Retention

□ Talent Pool Applicant Profile

| | |
|---|--------------------------------|
| Special Skills/Expertise | |
| Licenses/Certifications: | |
| Technology: | |
| Professional Expertise: | |
| Languages: | |
| Developmental Experiences – Past 3 Years | |
| Formal Training: | Competencies/Skills Developed: |
| Special Assignments: | Competencies/Skills Developed: |
| Other: | Competencies/Skills Developed: |

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Workforce Review – Employee Readiness

Position Title

Years of experience in Current Position

Years of experience in Field of Work

Do you feel you have the adequate training and development to perform your current job?

If no, what training and development would help you perform your current job?

Do you desire to be promoted in your current organization should a vacancy occur?

To what type of position would you like to be promoted?

Do you feel you have the adequate training and experience to be promoted within your organization?

If not, what type of training and development would help you achieve your career goals?

Institutional Knowledge Transfer Assessment

Use the Institutional Knowledge Assessment Tool (IKAT):

- 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

Employee Development Plan



Determine desirable skill set for position



Assess employee background and experience



Develop training and development plan for specific employee



Identify training resources



Include development plan in professional development plan



Document progress

Employee Retention Plan



Survey employees about job and work environment satisfaction



Review benefits

Salary
Medical Benefits and Paid Time Off
Employee Development
Longevity
Work Schedules



Review collective bargaining agreements

Employee Retention – Practical Matters

- Data Speaks
 - 40% of U.S. Workers have jobs that can be done remotely
 - 59% of U.S. Workers who say their jobs can be done mainly remotely are working remotely all or most of the time
 - Of new remote workers, 64% say it's easier to balance work and personal life; 44% say it's easier to get work done and meet deadlines
 - Important to be intentional about connection – 60% of new remote workers feel less connected to coworkers

□ *Pew Research Center – COVID-19 Pandemic Continues to Reshape Work in America – February 2022*

Employee Retention – Practical Matters

□ Data Speaks

□ Work-related Impacts on Caregivers are Significant:

- 70% of working caregivers suffer work-related difficulties due to dual roles
- 69% of working caregivers rearrange work schedules, decrease hours, take unpaid leave to meet caregiving responsibilities
- More pronounced impacts on female caregivers – more likely than males to make alternative arrangements (take less demanding jobs, quit working, lose job benefits)

□ *Family Caregiver Alliance. Caregiver Statistics: Work and Caregiving.*

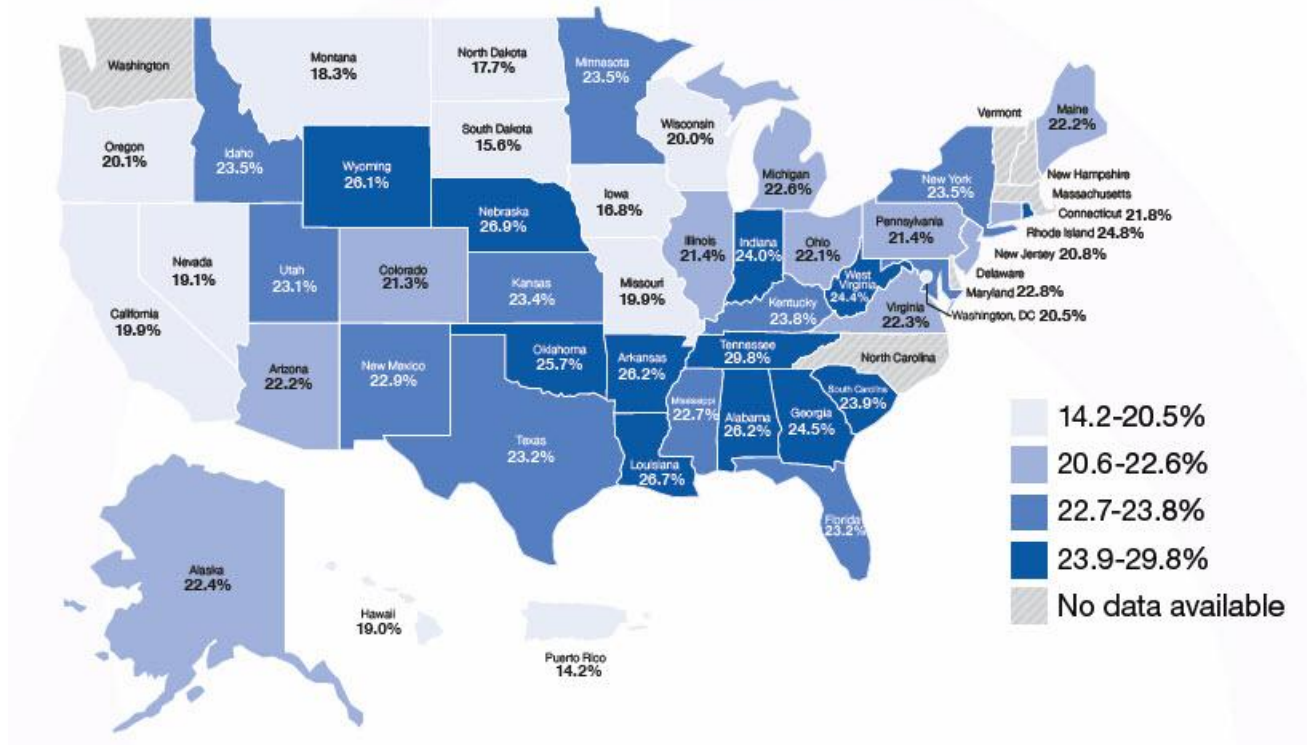
□ 1 in 4 women are caregivers, compared to 1 in 5 men

□ *CDC – Caregiving for Family and Friends – A Public Health Issue*

Employee Retention – Practical Matters

Characteristics of Caregivers and the Caregiving Situation

Figure 1: Adults aged 45 years or older who reported being a caregiver to a friend or family member



Employee Retention – Considerations

- Leadership Expectations
- Communication
- DEI Goals
- Sustainability
- Cost
- Employee Wellness
- Geographic Considerations
- Pilot Programs

- **Flexibility is Key!**

Employee Retention Strategies

- Work Schedule
 - Hybrid Work
 - Remote Work
 - Flexible Schedules by Position
 - Summer Hours
 - Modified Hours
- Tools = Trust
 - Supervisory Fundamentals
 - Intentional Communication
 - Cross training
 - Process Improvement
 - Empowerment

Employee Retention Strategies

- Professional Development
- Education and Training – Tuition Reimbursement/Assistance with Student Loans
- Merit Incentives
- Technology
- Benefits
 - Paid Time Off
 - Contribution to 457 or IRA
 - Short- and Long-Term Disability
 - Long Term Care
 - Pet Insurance

Employee Retention – Survey!

- Surveys Completed in 2005 and 2013 based on Generations in the Workplace (North Carolina 2005 – Illinois 2013)

- 2005 and 2013 – Top Items
 - Alternative/Flexible Work Schedule
 - Merit - Pay for Performance
 - Monetary Incentives for Innovation
 - More Time Off

Wrap Up

Next Steps

- You now have the tools to develop your own Succession and Employee Retention Plan!

Follow up from GovHR USA – Joellen

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Feedback

- We're happy to receive your feedback – please feel free to share!

Alternative Staffing Options

- Mentoring Talent
- Job Sharing
- Phasing Retirement
- Outsourcing/Contracting
- Interim or Project Work
- Temp-to-Hire

Mentoring Talent



Consider promoting or bringing on staff that may not be fully trained to complete an assignment.



Use existing staff to develop internal talent by sharing experiences and conducting training.



Locate and in-source a retired professional to work with a staff member on developing skills sets in areas that may be underdeveloped and on creating a professional network of peers for future support.

Job Sharing – Colleagues/Communities

Discuss with colleagues in surrounding communities long term staffing needs.

Retain or engage a professional to complete the identified functions in a job share arrangement.

Job shares can be used for general oversight, such as Finance Director duties or for very specialized skills such as TIF Administration, CALEA Administration, RFP Development and Analysis, ERP Project Management, Grant Administration.

Phasing Retirement

Rather than pick a firm retirement date on the calendar, slowly phase out an employee.

Outsource the employee to a third-party provider and then hire the person back on an interim, part-time or as-needed basis.

Benefits include helping the transition of a new staff member who will be filling the vacated position and easing the transition to retirement for the employee, especially if he or she is long-tenured.

Outsourcing/Contracting Technical/Seasonal/Part-time/Projects



Consider filling jobs in a non-traditional way based on the actual needs of the organization.



Look at work cycles and peak staffing times, such as billing cycles, sticker sales and year-end.



Bring on additional staff through a third-party to address the fluctuations in staffing needs.



Consider permanently outsourcing functions or projects that can be done professionally seeking part-time or project-oriented work – such as studies, data preparation, engineering, plan review, CALEA, etc.

Interim or Project Work

Consider using interim or project workers to staff in the following instances:



During critical times when the primary worker is out – such as medical leave or other long-term leave is necessary but not permanent.



When an unplanned departure is made from the organization and there is an opportunity to analyze staffing needs before a permanent appointment is made.



When a project needs to be completed on a one-time basis.

Temp-to-Hire

Temp-to-Hire is an excellent option in the following instances:



During a promotional opportunity



When determining if previously laid off workers can be restored to prior positions



When a candidate for a position is suited for a “trial run” before a commitment to permanent employment is offered



Can be done with an Internal or External Candidate