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 internal people with the potential to fill key leadership positions in the organization. Succession planning increases the availability of experienced and capable employees that are prepared to assume these roles as they become available.
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

- **Review** present workforce and organizational objectives – upcoming retirements and strategic initiatives
- **Identify** future workforce needs – up and coming issues – mission critical positions – core competencies
- **Analyze** present and future needs to identify gaps or surplus – review/update job descriptions
- **Develop and Implement** 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

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Workforce Needs
Positions to Fill

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

- Human Services
  - Cultural Services
  - Teen and Early Childhood Services
  - Nurses
Workforce Needs Positions to Fill

- 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
Workforce Needs
Positions to Fill

- Community Development
  - Inspectors
  - Planners and Plan Reviewers
  - Code Compliance

- Public Works
  - Directors
  - Engineers
  - Water/Sewer
  - Maintenance Workers
  - Mechanics
Workforce Needs
Positions to Fill

- 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

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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...

Please call or email if we can be of assistance:

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