

Succession Planning

League of Municipalities

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Need for Succession Planning

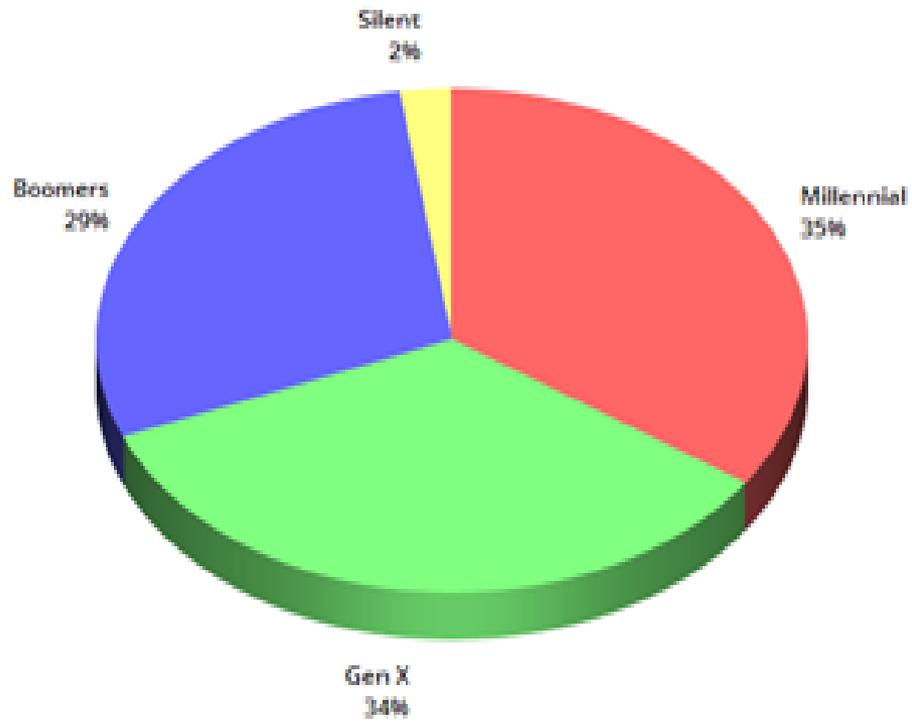
Events

- Early Retirement 1
- Early Retirement 2
- Pension Reform
- Health Benefit Reform
- Baby Boomer Retiring

Impact

- Mass Exodus
- Mass Hiring
- Loss of Organization
Memory
- Brain Drain
- Recruiting Shortage

PERCENTAGE OF EACH GENERATION IN THE WORKFORCE



Replacement vs. Succession Planning

- Replacement planning is the process of finding the next capable individual to assume a vacant position.
- Succession planning is an organizational effort from the time of recruitment to improve skills, knowledge and experience to advance individuals to their highest capable position.

Put the right people in the right place at
the right time



Variables Affecting Succession Planning

- Formal vs. informal approaches
- Civil Service vs. non Civil Service
- Large municipalities vs. small municipalities
- Forms of government:
 - Strong Mayor, Weak Mayor (various lengths of terms)
 - Municipal Administrator (varies degrees of authority)
 - Municipal Manager

Elements for Succession Planning

- Keep an open mind-put bias aside
- Organizational culture
- Realize that mistakes happen
- Mentoring is essential
- Build your bench strength and organizational resilience to prepare for unexpected events and losses
- Retaining talent to protect your investment
- Interdepartmental communications, coordination and cooperation are important

Steps to Succession Planning



Steps to Succession Planning

-Continued-

- Identify key roles of the organization – existing or new
- Transfer organizational memory –documentation and storytelling take time
- Identify strengths and weakness of your organization

Steps to Succession Planning

-Continued-

- Develop a census of key positions
 - Age, years in service, estimated date of retirement
 - Personal information- children in college ,spouse retired, etc.
- Determine the training , certification, license that candidates may require to assume the key position
- Identify potential candidates on staff

Steps to Succession Planning

-Continued-

- Do not assume the potential candidates want the position.
- Develop a timeline for the process involved in filling the position.

Identifying Talent



Identifying Talent

-Continued-

- Select individuals to be on project teams
 - Include individuals from different departments and position levels
- Feed them and they will talk
 - At an informal employee gathering, individuals speak more freely
- Look for information or assistance when supervisor is not present

Identifying Talent

-Continued-

- Ask employees for assistance (some people like to be asked)
- Be observant-walking around-Friday Rides
- Review time and attendance information
- How well is time off coordinated at department and organizational level?
- Does rank really have privileges?

Assessing Potential Leaders



Assessing Potential Leaders

-Continued-

- Do they show an interest in their job and in government in general?
- Do they volunteer for work assignments as well as extra municipal events?
- Do they appear to be team players?
- Do they demonstrate leadership skills?
- Are they afraid of making a decision or mistake?
- Do they see challenges vs. problems?

Assessing Potential Leaders

-Continued-

- Always propose answers (more) when bringing you a issue.
- Are they brief and complete in their reporting both in writing and verbally.
- Do they give credit to others?
- Do they criticize others in order to enhance their own position?

Determining the Level of Upward Movement



Analyzing Employees

- Eager Beaver: I will do it and more
- Donkey: keep loading more tasks on
- Buzzard: what's in it for me
- Charlie Brown: optimist
- Lucy Van Pelt: professional pessimist

Analyzing Employees

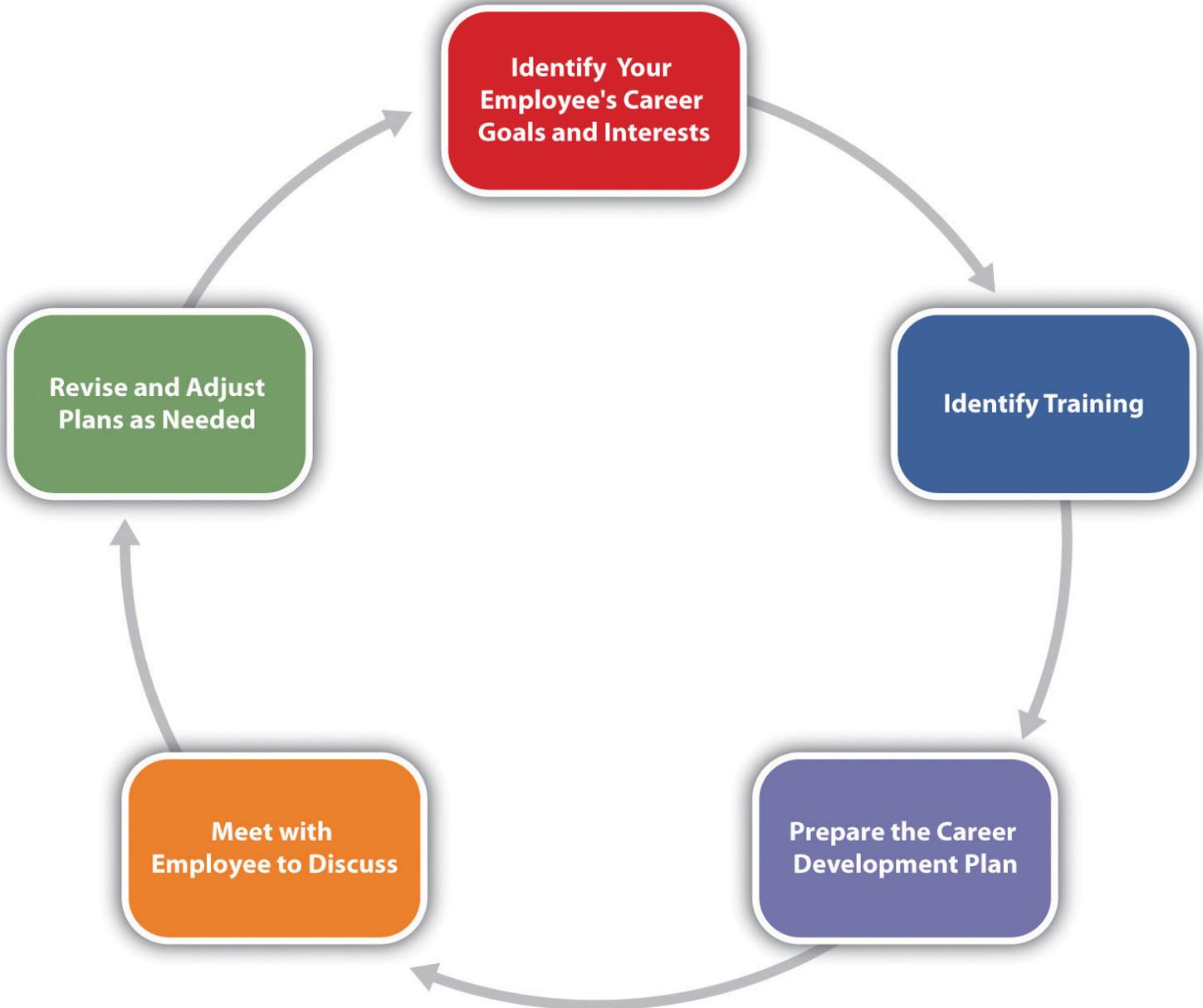
- Some employees do not like change.
- Some employees do poorly in self evaluation.
- Some employees like to be asked repeatedly.
- Some employees are not good at sharing job related information.
- Some employees are resistant to mentoring.

Someone is sitting in the shade today because
someone planted a tree a long time ago
-Warren Buffet



Mentoring

- Mentoring is a lifetime commitment.
- Mentoring takes time, but use your time wisely.
- Identify potential mentors.
- Does rank, age or department have an impact on the pairing of employee with mentor.



**Identify Your
Employee's Career
Goals and Interests**

Identify Training

**Prepare the Career
Development Plan**

**Meet with
Employee to Discuss**

**Revise and Adjust
Plans as Needed**

Things to Remember

- Mistakes happen.
- Be open minded.
- Be as honest as possible.
- People do change- but not their personalities.
- The meek can inherit the earth, just ask.
- Be observant-walk around with mouth closed and eyes open.
- Everyone has a skill set-discover it.

Things to Remember

-Continued-

- Do not pigeon hole employees into one job or one department.
- Rotation of employees increases their value and serves to demonstrate their talents and skills.
- Evaluate each individual in relation to the organization.

Millburn Fire Department

- What percentage of confidence do you have in being put into leadership role of captain?
 - 12% of the responders have 25% Confidence
 - 33% of responders had 50 %
 - 22% of responders had 75%
 - 33% of responders had 100%

Millburn Fire Department

- What do you think would have been more valuable to help you adjust you in your new position when you were promoted to Captain?
 - 6% indicated hands on training
 - 20% indicated classroom training
 - 20% indicated learning on the job
 - 54% indicated mentorship

Captain Christopher Beady's Findings

- Findings
 - Mentoring is a way to make people successful.
 - Regardless of rank every member of the Department wants to have a voice.
 - Senior firefighters and officers were unanimous in seeing a benefit to mentoring and being part of it.

Cost of Not Succession Planning

- No coverage for position
- Recruitment challenges
- Retention challenges
- No backup plan
- Untrained employees could be placed into critical roles without adequate preparation.
 - Mistakes
 - Unfair to employees and taxpayers

Questions & Comments

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