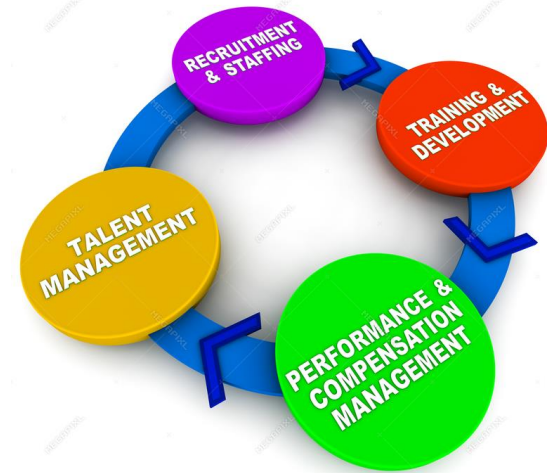


Succession Planning: How to do it Right – Transformation from Talent Management to Succession Planning and Back



Succession Planning - AJ

- Strategy for Passing on Leadership Roles
- Future-Focused Practice
- Succession Planning Processes
 - Training
 - Development
 - Career Planning
 - Career Management
 - Replacement Management
 - Succession Planning



The Bench - AJ

- What type of person should you hire?



DEI Considerations - AJ



DI·VER·SI·TY

All the ways in which people differ.



EQ·UI·TY

Fair treatment, access, opportunity, and advancement for all people. One's identity cannot predict the outcome.



IN·CLU·SION

A variety of people have power, a voice, and decision-making authority.

Definitions sourced from City of Portland Office of Equity and Human Rights, The Independent Sector, and UC Berkeley.

Barriers - AJ



Business Case - AJ

- Demographic Changes
- Skills Gaps and Training Needs
- Preserving Institutional Knowledge
- Investing in People
- Upskilling
- Disruption



Organizations - BB

- Organizations large and small must rely on **teamwork concepts** to ensure continuity of service and operational effectiveness when vacancies occur.
- Larger organizations have the **advantages of depth of staffing**, which have the potential staff competencies to ensure staffing exists to provide back up to critical functions.
- Smaller organizations are far more limited to carry on critical services should key vacancies in personnel arise and **really need more preparation time for a successful succession program.**
- Regardless of organizational size, **open discussion, contingency planning**, and **“practice” is required** to provide a continuity of service should be a priority for a well run City or Village.

Staffing - BB

- Sources of staffing can come from several sources:
 - **Senior and middle management** staffing with formal succession responsibilities
 - **Interdepartmental staffing resources** who are competent to execute the overall service plan
 - **Recently retired members** of the organization **who may be eligible** for short-term service
 - Short-term **contracted** services
 - **Shared services personnel** who may be available

Options to Avoid - BB

- Volunteers interested in “helping”
- Elected and appointed officials, except for very narrowly defined assignments
- Anyone from the working press



Succession Rollout Strategies -BB

- Select strongest resources from existing staff
- Train up to duties and responsibilities and information needed to succeed
- Real time actual “sitting in the Chair” opportunities
- Make these assignments a part of the annual performance plan objectives for the individual participants
- Open a conversation with outsourced resources that may be considered from firms and individuals



Succession Rollout Strategies -BB

- Don't forget to train up competencies (and passwords) when online support systems are in use
- Build team competencies through information sharing on a regular basis and internal staff training opportunities
- You will surprise yourself with the depth of capabilities of current staff in development exercises are effective
- Lean on your existing team to step up their game to support efforts



Thank you! - Q&A

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