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Changes in Key Administrative Staff – Succession Planning


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Objectives

- Define succession planning
- Describe the need for thoughtful succession planning
- Review suggested strategies for preparing a succession plan
- Review JAC’s succession planning for senior management
- Review JAC’s role in assisting your office with transitions in key administrative staff

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No Succession Plan

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"Well, it's not the worst I've seen."

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Succession Planning – What is it?

- Preparing in advance for employee departures, especially key administrative staff
- Mentoring employees to eventually take over key duties
- Exposing a variety of individuals to key functions
- Creating strategies to fill key roles
- Transferring knowledge between departing employees and remaining staff

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Succession Planning – What do the Experts Say?

- The practice of succession planning is key to sustaining an organization's initiatives and performance and to ensuring it meets its mission even in the face of turnover
- The most important change for the public sector is shifting from one-to-one replacement mapping to creating a pool of future leaders capable of meeting the succession needs of the organization

(Source: Brian Wilkerson, Planning in the Public Sector, Watson Wyatt Worldwide, watsonwyatt.com, 2007)

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Succession Planning – What do the Experts Say?

- Effective succession must be linked to other management and HR processes, and must become part of the culture of the organization
- Succession planning is a key element of an effective strategy for managing talent and ensuring that an organization achieves its future goals

(Source: Brian Wilkerson, Planning in the Public Sector, Watson Wyatt Worldwide, watsonwyatt.com, 2007)

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Succession Planning in Laymen's Terms

- Prepare for the departure of key staff long before they depart (when possible)
- Look around the agency to identify future leaders and train and mentor them to step into key roles, over time
- Managers and administrators have a wealth of knowledge that should be disseminated to others over time, prior to departing from the agency

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Succession Planning in Laymen's Terms

- Provide leadership and other relevant training to non-managerial staff to prepare them to transition to management as needed
- Succession planning doesn't have to be a formal process with forms and charts and analysis; it's a matter of looking to the future in a thoughtful way
- Succession planning is not just an HR function but should be incorporated into the "fabric" of each work unit

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Key Staff and Processes Keep Operations Going

The wheels stop turning if key staff are gone and no one is prepared to take on that role or process.

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Succession Planning Tasks


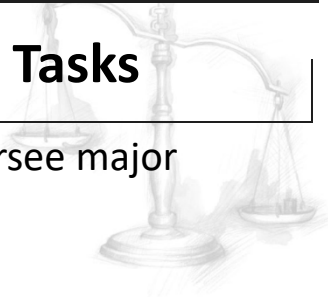
- Identify critical responsibilities and processes that would create havoc if staff departed suddenly
- Cross-train others to cover the critical responsibilities
- Avoid having all your “eggs in one basket”
 - One person responsible for too many things
 - All the knowledge with one person

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Succession Planning Tasks

- Identify key staff who oversee major administrative functions
- Identify key processes
 - Human resources
 - Budget management
 - Purchasing
 - Invoice processing
 - Other


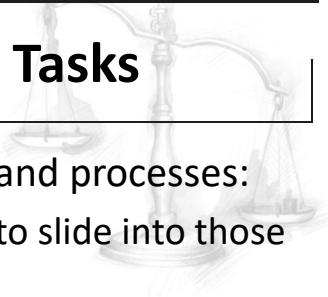


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Succession Planning Tasks

- After identifying key staff and processes:
 - Determine possible staff to slide into those roles if needed
 - Provide training and exposure to tasks and decision-making long before a departure
 - Provide opportunities to attend meetings, read documents, and transfer knowledge to potential replacement staff



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Succession Planning Tasks

- After identifying key staff and processes (cont.)
 - For retirements, allow a long period of time to mentor/train person taking on that role
 - Provide managerial, technical or other training to future leaders, before they become leaders
 - Communicate the succession planning vision to the agency
 - Encourage the identification of future leaders as part of the culture

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Additional Benefits to Succession Planning

- Better trained staff
- Holistic approach to office operations
- Improved office culture
- Better work/life balance for all staff
- Improved morale
- Better retention

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Questions?

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