Succession Planning for a Healthy Vibrant Agency

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Things have been going well for years.

I cannot remember a time when the same familiar faces who know what to do were not here.

Because many agencies are small and because we face daily organizational challenges, thinking about what would happen if one of those familiar faces suddenly left is not high on our priority list.

Controlling mosquitoes now is job one!
We rely on these familiar faces to carry out our missions, provide services and meet our organization's goals.

They answer our questions and guide us during all situations.

They’ll always be here with us (retirement is a long way off – right??).

Besides, who would we turn to if they went away?
Then it Happened!

In January 2014, our Executive Director took a job in Florida.

In April 2014, our Business Administrator retired. He had been the interim Executive Director.

No replacement Business Administrator had been found. The search was just beginning.
Many agencies are staffed by long term employees. A significant proportion of these employees are within 5-10 years of retirement. Retirements already have begun – the associated transitions can be difficult.
Challenges

Small agencies are staffed by many single incumbent employees.

How to transfer long term experience.

Foster personal and professional growth opportunities.

Consider future agency needs including how to leverage new tools.
Challenges

To start planning for change long before it happens.

With careful planning and preparation, organizations can manage the changes that result from:

- A generational transfer of leadership
- Key employees leave an organization
Succession Planning

Succession planning acknowledges that staff will not be with an organization indefinitely.

It provides a plan and process for addressing the changes that will occur when staff leave.

It includes developing a pool of potential replacement employees.
Succession Planning

Succession planning should include all key positions.

Key positions:

Those positions that are crucial for the operations of your organization and, because of skill, seniority and/or experience, will be hard to replace.
Potential Planning Tools

Organizational charts and job descriptions

Services provided by agency

Selecting key positions/employees

Methods to assess which positions will need replacements and when (how much lead time)

Methods to assess growth of current employees required to fill key positions
Potential Planning Tools

Organizational Charts – Job Position Relations
Mission Statement - Services

Protection / Control
Disease / Annoyance
Environmental

To promote health and well-being by protecting the public from disease and annoyance caused by mosquitoes, black flies, and ticks in an environmentally sensitive manner.
Selecting Potential Candidates

Selection is based on positions to fill.

There will be some available candidates who are ready and some who will need to enhance their skills.

Common methods used to summarize the available candidates and their readiness level include the readiness level chart.

For some positions there will be no identifiable internal candidate for succession.
# Sample Readiness Level Chart

<table>
<thead>
<tr>
<th>Key Position Title</th>
<th>Incumbent Name</th>
<th>Position Vulnerability</th>
<th>Succession Candidate Names</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Open in &lt; 1 Yr</td>
<td>Open in 1–3 Yrs</td>
</tr>
<tr>
<td>District Operations Mgr</td>
<td></td>
<td>+</td>
<td>Air Coord</td>
</tr>
<tr>
<td>Accounting Mgr</td>
<td></td>
<td>+</td>
<td>???</td>
</tr>
<tr>
<td>Executive Director</td>
<td></td>
<td>+</td>
<td>Vector Ecol</td>
</tr>
<tr>
<td>PR Coordinator</td>
<td></td>
<td>+</td>
<td>Admin Asst</td>
</tr>
<tr>
<td>Tech Serv Coord</td>
<td></td>
<td>+</td>
<td>???</td>
</tr>
<tr>
<td>HR Mgr</td>
<td></td>
<td>+</td>
<td>???</td>
</tr>
</tbody>
</table>
Developing Potential Candidates

Evaluate readiness (skills, desires) of potential candidates.

Identify strengths and growth needs (360-degree feedback, performance appraisals).

Create action plans to develop strengths and define required growth.
Developing Potential Candidates

Common action plans include:

- leadership development programs
- skill specific educational programs

Plans also may include an internal mentoring program.
MMCD Outcome  2014-15

New Executive Director
New Business Administrator
Public Relations
Two new Administrative Assistants
Information Systems
Two new Information Systems Employees
MMCD Plans/Needs 2015-22

- Accounting Manager
- Human Resources
- Vector Ecologist
- Tech Services Coordinator
- Building Manager
MMCD Plans/Needs 2015-22

Field Operations Supervisors
Regional Operations Managers
District Operations Manager
Executive Director
Resources

Society for Human Resource Management

http://www.shrm.org

Human Resources Canada

http://www.hrcouncil.ca/home.cfm
The legacy of successful leaders lives on through the people they touch along the way

John C. Maxwell
2014

Good Leaders
Ask Great Questions
Thank-you

Questions?