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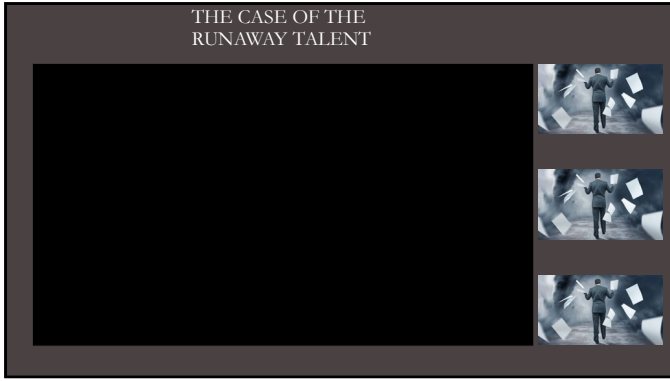
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**Focus**

- Developing key talent for future leadership roles
- Guarding institutional leadership knowledge

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**Succession Planning**

- Focuses on Critical Positions
- It is NOT Replacement Planning
- It is a Continuous Process

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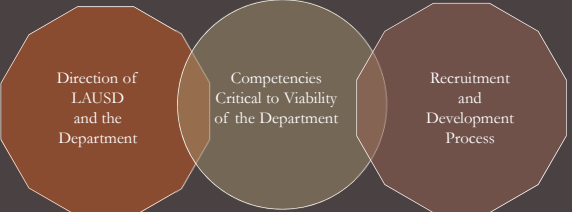
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**CRITICAL VARIABLES**




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Identifying Key Positions

### Identifying Key Positions

A key position is defined as a position that is **critical to the viability and continuity** of an organization, regardless of the incumbent occupying the position

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Identifying Key Positions

- Identify Oversight Committee
- Identify Critical Key Positions
- Define Organizational and Job Competencies

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Identifying Key Positions

### KEY POSITIONS

- ◆ Availability of key skills sets in the Organization
- ◆ Availability of key skill sets in the market
- ◆ Impact of position in
  - Functional Capacity
  - Political Capacity
  - Economic Capacity
- ◆ Proximity of incumbent's retirement

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Identifying Key Positions

### Departmental SWOT Analysis

Strengths	Weaknesses
Opportunities	Threats

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Identifying Key Positions

### Competency Identification Worksheet

Job Duties/Essential Functions	KSAOs	Associated Competencies
• _____	• _____	• _____
• _____	• _____	• _____
• _____	• _____	• _____

 Personnel Commission Website Job Description

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Identifying Key Positions



Personnel Commission Website  
Classified Growth and Development  
Classified Performance Framework

### CLASSIFIED PERFORMANCE FRAMEWORK

- Behavior/Conduct
- Communication
- Adaptability
- Work Attributes
- Interpersonal Skills
- Professional/Technical Expertise
- Leadership

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Tools for Step 1



- Definitions
- SWOT Analysis
- Competency Identification
- Classified Performance Framework
- Critical Positions Tool
- Turnover Calculator

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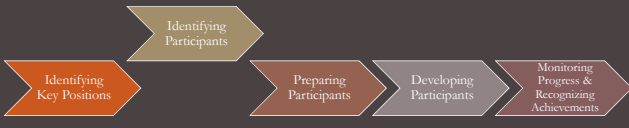
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### THE FIVE STEP PROCESS STEP 2



Identifying Key Positions

Identifying Participants

Preparing Participants

Developing Participants

Monitoring Progress & Recognizing Achievements

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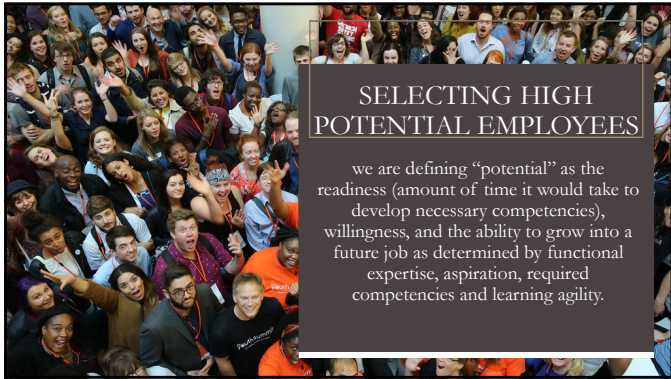
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### SELECTING HIGH POTENTIAL EMPLOYEES

we are defining “potential” as the readiness (amount of time it would take to develop necessary competencies), willingness, and the ability to grow into a future job as determined by functional expertise, aspiration, required competencies and learning agility.

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### Tools for Step 2

Application Template

KSA Assessment

Competency Assessment

Candidate Potential Rating Form

9-Box Toolset



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**Succession Planning Program Application Template**

- Explain why you are interested in working toward attaining this position?
- Complete Self- Assessment
- Submit Current Resume
- Ask current Supervisor to complete Assessment




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**Tools for Step 2**

**KSA Assessment**

**Competency Assessment**

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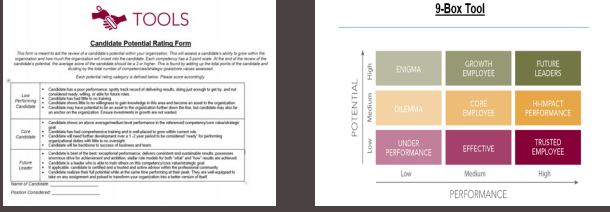
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**Tools for Step 2**

**Candidate Potential Rating Form**

**9-Box Toolset**




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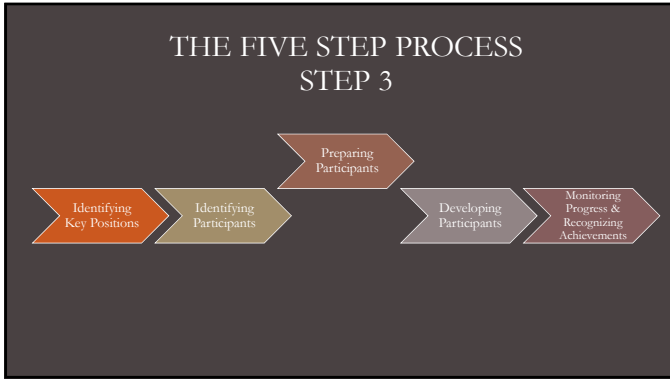
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Preparing Participants

To set up the succession planning program for success, it is imperative that the expectations and criteria for the program are transparent to all involved, especially potential participants

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Preparing Participants

- Discuss the purpose and goals of Succession Planning
- Discuss the demands of the program
- Discuss expectations including pre-work

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Preparing Participants

- Communicate Expectations
- Communicate Available Resources
- Communicate with Transparency

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Tools for Step 3

- Expectations Form
- Individual Development Plan
- Organizational Excellence
- MyPLN
- Training Development List




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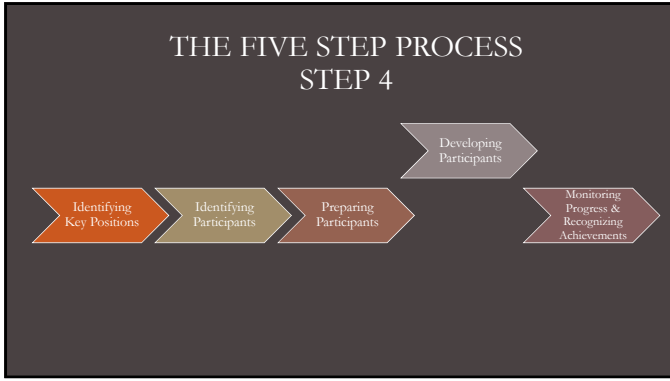
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**EXPECTED OUTCOME 1:  
PARTICIPANT LEARNING: GROUP SETTING**

- Opportunities offered to each participant
- A common base of knowledge, skills and abilities across the key leadership ranks
- An opportunity for participants to get to know their peers better and learn to interact and collaborate in a leadership-focused setting

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**EXPECTED OUTCOME 2 :**  
**PARTICIPANT LEARNING: INDIVIDUAL SETTING**

- Opportunities provided on an individual basis linked to the participants' developmental gaps to:
- Accelerate their learning beyond what would normally be acquired on a longer-term basis, such as time on the job
- Envision a career path supported by classes, mentors and working with peers

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**EXPECTED OUTCOME 3 :**  
**PARTICIPANT LEARNING: LEADERSHIP SETTING**

- Opportunities for participants to operate fellow leader workgroups, utilizing their skills to achieve a desired outcome to benefit the organization
- To help the participants obtain needed, demonstrated abilities helpful to their future promotion
- To learn to work together in cross-functional fashion with other organizational leaders, as needed, when sitting in an executive or senior leadership role

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## ON THE JOB TRAINING (OJT)

- Managing a project, especially in a new focus
- Serving on a Cross Functional Team
- Taking on a New Task or Assignment
- Job Shadowing an Established Expert
- Job Rotation/Job Sharing
- Interim Assignments within a Project Team
- Having a Mentor
- Volunteering with an external organization to pursue a learning situation

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## STEP 4 - TOOL

A Development Pathway Table is an ideal tool in assisting in the development of succession planning participants by illustrating current and future needed development paths for closing competency gaps. The development paths show internal and external resources for each targeted competency gap. (Page 16)

**TOOLS**  
Developmental Pathway Table

Example of table for determining current and future needed development paths for closing competency gaps.

Competency	Current Competency	OJT resources	Self learning resources	Professional development	Courses, seminars, conferences
<b>Ability</b> Develop and enhance an individual's knowledge, skills, and abilities to meet the needs of the organization. <b>Required knowledge</b> <ul style="list-style-type: none"> <li>• Organizational structure</li> <li>• Organizational culture</li> <li>• Business strategy and vision</li> <li>• Industry trends and competitive landscape</li> <li>• Current and future organizational goals</li> <li>• Current and future organizational challenges</li> <li>• Current and future organizational opportunities</li> <li>• Current and future organizational risks</li> </ul>					

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Developing Participants

### Training Development Resources list

- Organizational Excellence Training Branch
- MyPLN
- Public Library
- Youtube

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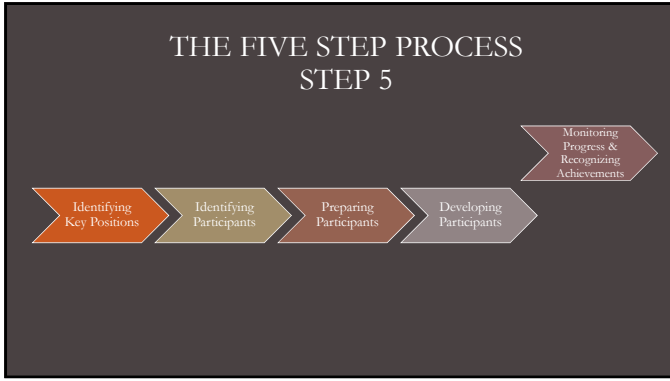
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*STEP 5 involves monitoring individual and program progress and recognizing participant achievement, which are important, and provide for communication and modifications in future years*

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**Tools for Step 5**

- Succession Planning Report
- Core Competencies BARS
- Succession Planning Balanced Scorecard

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**COURSE SUMMARY**

- Defined Succession Planning
- Described the 5 Step Process
- Discussed how to identify Critical Positions
- Discussed Selecting and Developing Participants for Succession Planning
- Toolkits and Resources

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**THE FIVE STEP PROCESS SUCCESSION PLANNING**

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