



We need to plan and develop the future leadership for CE units

- We face an aging workforce and looming retirements
- Our best people are more likely to leave in a competitive job market
- We are concerned about retention, knowledge transfer, continuity of operations

What is Succession Planning and Management?

A deliberate and systematic effort that ensures:

- Leadership continuity in key positions
- Retention and development of intellectual capital for the future
- Encouragement of individual advancement

Succession vs. Replacement

<u>Succession Plans</u>	<u>Replacement Plans</u>
<ul style="list-style-type: none">• <u>Long-term</u>: 12-36 months• Focus on <u>future</u> leadership• Develops leaders capable of filling <u>multiple</u> assignments	<ul style="list-style-type: none">• <u>Short term</u>: 0-12 months• Focus on <u>immediate</u> needs• Develops back-up staff for key positions

How does it happen?

We apply specific procedures to insure that talent is:

- Identified
- Developed
- Retained

Traditional approaches to meeting succession needs

In

- Up
- Down
- Across
- Progress in Place (career ladders)

Out

Roles and Involvement

- Leadership Champions
- **Human Resources Team**
- Dialogue Teams within organization
- **Internal Employees identified for possible succession**
- Outside facilitators, recruiters
- **Other outside organizations as sources for recruitment**

I. Planning: Internal Discussions

1. Succession needs and priorities
2. **Environmental Scan**
3. Work functions: now and in future
4. **Demand: Staffing level, skills, titles**
5. Supply: likely availability of workers
6. **Gaps: priority needs**
7. Solutions: what specific actions will you take to address the priorities?

Next: Identify potential internal candidates

- Quality performance review process that assesses Skills, Knowledge, Abilities and Potential promise for key positions.
- **Inquiry as to level of interest in advancement to key positions**

II. Implementation of the Succession Plan

- Conduct Succession Planning Training for the organization's leaders
- **Analyze critical skills and the workforce**
- Address critical skills shortages

II-A: Internal Candidates

Advantages

- **Provides rewards and incentives for great employees**
- **Cost effective**
- **Morale-boosting**

Disadvantages

- Organizational inbreeding
- Possible infighting or jockeying for position
- Heavy load on training and development

Development of Internal Candidate Pool

- Training Programs
- Mentoring Plans
- Implement "Emerging Leaders" and "Advanced Leaders" development programs
- Meaningful performance reviews and goal setting
- Career ladders
- Mentor/supervisory feedback processes

Human Resource Development Components

- Training: Based on skills, knowledge and abilities in present job
- Development: Preparing for future responsibilities
- Organizational Development: Planning interventions to enhance organizational effectiveness
- Career Development: Planning and managing career stages

Career Development

Where career plans are developed, implemented and tracked

- Employee self-assessment
- Employee development systems
- Individual coaching/counseling
- Job matching systems

II-B: External Applicants

Sources may include:

- Former employees
- Referrals from colleagues and employees
- Previous applications
- Professional associations
- Internet applicant pools
- Search firms and agencies
- Advertising and walk-in applicants

Decision: Internal or External?

Depends on

- Organization's needs, culture and philosophy
- Geographic location
- Labor pool for level of positions to be filled
- Pay and benefits
- Time and budget constraints
- Affirmative Action goals
- Labor Union obligations

III. Evaluation

Make your succession planning efforts a learning opportunity.

- Evaluate the success of job filling goals
- Evaluate whether planned career development has taken place

A We Want to Become an Employer of Choice

Become an employer of choice by:

- Ensuring work-life balance
- Providing opportunities to learn and advance
- Give incentives for top performance
- Keep "spirit" in the workplace
- Have a participative environment



Further information...

Winning the Talent Wars: Bruce
Tulgan

Career Planning and Development

William J. Rothwell et al.

Effective Succession Planning:
William J. Rothwell.

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