YOUR SUCCESSION IS OUR MISSION....

Succession Planning at Owens Community College

Process Management Team
Fall 2006

Table of Contents

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Succession Planning Process
Background Information

Our team was given the mission of working toward developing a Succession Plan Process for the College. Our initial discussions revolved around trying to define succession planning, as we were asked to identify the aim, size and scope of the undertaking. Our team discussed various aspects of succession planning as follows:

1. Transitional plan for re-engagement of employees nearing retirement
2. Transitional plan for mid-career employees who may wish to broaden/diversify career path within the institution
3. Transitional plan for ensuring familiarity with/mastery of job skills in positions with an imminent retirement

We decided to focus on planned transitions for non-union employees as we develop a proposed succession plan to ensure continuity of quality of service to our students. We believe this approach is a direct link with the overall mission of Owens Community College - "We believe in serving our students and our communities. *Your success is our mission.*"

Research throughout this process confirms a critical issue arising in postsecondary institutions is the experience gap left by retiring key administrator and management staff. This has been exacerbated by early retirement options and an older age cohort of administrators. As a result, a notable volume of administrators in the "twilight stage" of their careers has been enticed to exit. This situation has brought to the forefront the lack of "succession planning" for these vacated positions and the absence of career development for potential administrators. The focus of the research was to identify forms of succession planning.

Since Owens Community College doesn't currently have a formal succession plan, it is the goal of our team to outline the steps of a succession plan that we can take to the steering committee for approval.

Operational Definitions

What is succession planning? The following definitions were included in our literature review.

- "A process by which an organization assures necessary and appropriate leadership for the future through a talent pipeline with the capabilities of sustaining an institution's long-term goals."

- "Identifying future potential leaders to fill key positions."

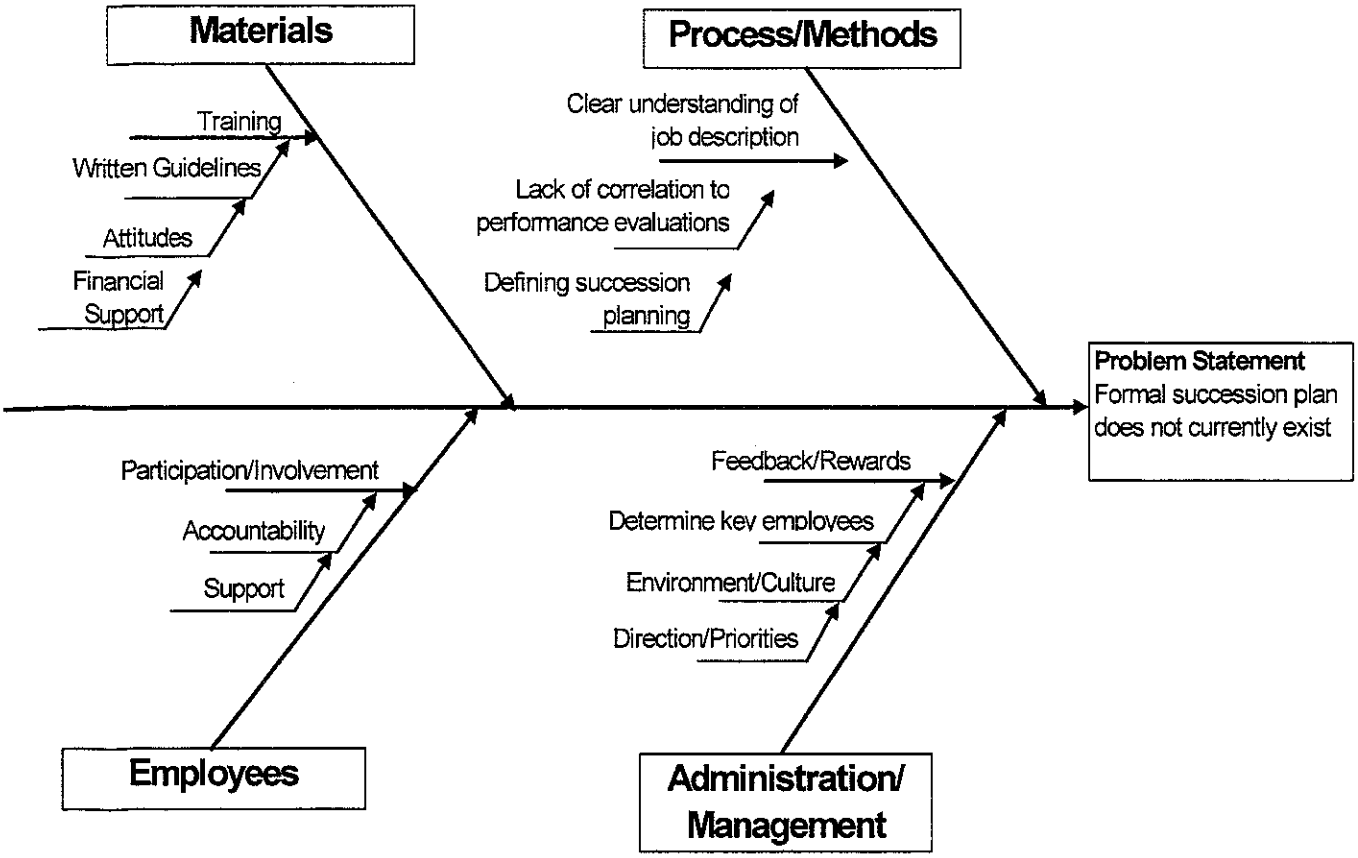
- "Ensures the continued effective performance of your organization by establishing a process to develop and replace key staff over time."

- "Contributes to an organization's continued survival and success by ensuring that replacements have been prepared to fill key vacancies on short notice, that individuals have been groomed to assume greater responsibility, and that they have been prepared to increase their proficiency in their work."

- "The deliberate and systematic effort to project leadership requirements, to identify a pool of high-potential candidates through intentional learning experiences, and then select leaders from the pool of potential leaders."

For the purpose of this project, our team defined succession planning as "a planned transition for non-union employees to ensure continuity of quality of services to our students."

Formal Succession Planning Challenges



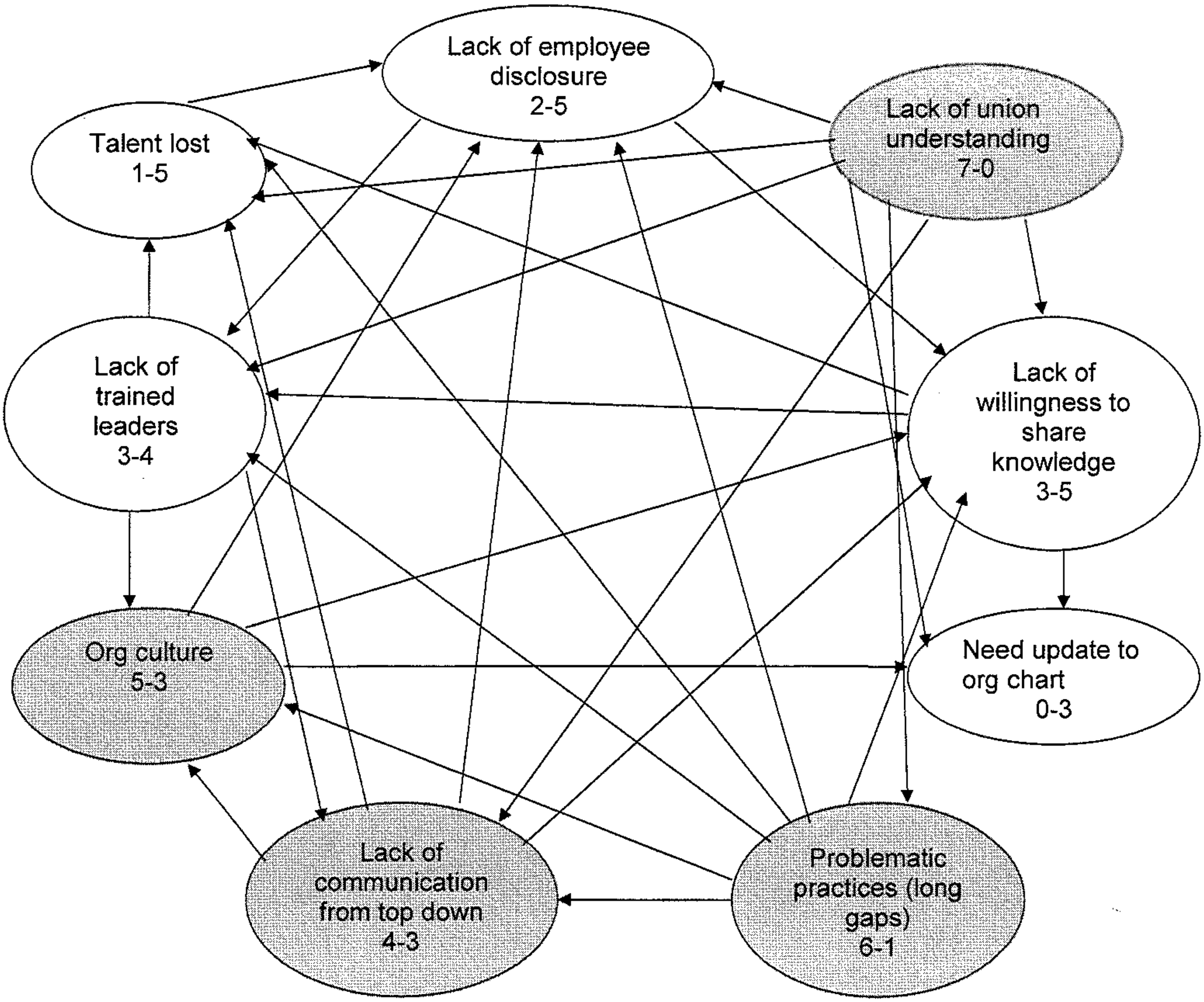
Key Elements Involved in Succession Planning

Root causes of not having a formal succession plan (shaded)

1. Lengthy gaps of time occur, prior to hiring a succession
2. Lack of communication from top leadership
3. Union issues (understanding)
4. Organizational culture does not promote succession planning

Root effects of not having a formal succession plan

1. Failing to retain talent
2. Employee lacks willingness to disclose plan to leave
3. Employee lacks willingness to prepare and share knowledge
4. Need update to organizational chart
5. Lack of trained leaders



Focus Group Data

In the data collection process, the team felt it was necessary to conduct a focus group of employees. We invited 30, and 12 employees voluntarily participated in the discussion held on October 12, 2006. These employees reflect the characteristics of being employed at the college for a number of years are between the ages of 40 – 65, and are representative of non-union support staff, professional staff and administrators. The questions used to guide the focus group discussion are incorporated in Appendix A.

On the following pages, is the data gleaned from the focus group.

Succession Planning
Focus Group Discussion - 10/12/06

Focus group participants: Shirley Moran, Janell Lang, Connie Buhr, Bill Ivoska, Bill Schmoekel, Patricia Smith, Lesta Mizer, Linda Stacy, Judy Ennis, Nancy Emrick, Joanne DeCant, Gary Ulrich

- Institution-wide plan needed
    - Replacing people in key positions is important, but needs to be a broader scope than just PC positions (support staff too)
    - Consensus reached that succession planning would be advantageous for most all positions within the institution
- Responsibility for Continuity/Shorten Gaps
    - We *all* have the responsibility to provide continuity
    - More responsibility from within for transition will strengthen morale
    - Need to alleviate the inordinate amount of time it takes to fill positions - this is causing us to lose talent in limited talent pool
    - As leaders we have responsibility to provide mentoring. Mentoring to develop talent within our institution may be even more effective/realistic than other methods
    - A lack of disclosure (willingness to share knowledge/assist in continuity) is likely personality based and is more the exception than the rule
- Documentation/Specified Job Description
    - Should have set procedures, standards, descriptions (even in high level positions)
    - Need to document skills; this will be helpful for those trying to plan career advancement
    - Need to reassess position and description when people leave, consider possible realignments
        - Any restructuring needs to be purposeful/careful (avoiding guarantees of promotion)
    - Problem: Job descriptions are never formally changed (even when updates are requested)

        - Criteria for changing job description should be laid out and HR needs to be responsive
        - Job description should be reflective of job duties and not focused on classification level/salary/title

- <u>Performance Evaluations as Barrier to Effective Planning</u>
    - Should be part of encouraging career planning - but currently is not
    - Needs to be strengthened
    - Need standards
    - Benchmarking
    - Too subjective, no consistency

- <u>Training Issues</u>
    - Need system to identify needed skills so appropriate training process/methods can be identified (Skills inventory)
    - Encourage training for several people to be able to fill a given position
    - We shouldn't wait until the experienced person is gone- they should be fully involved in the transition process (search process, devise overlap plan for training, etc.)
    - Training people in other positions is very difficult (nearly impossible) when a department is short staffed (Ex. ITS- Very short staffed. Plus, they would need 6 mo.-1 yr of full overlap to have an optimal transition)
    - Leadership skills are not necessarily equivalent or synonymous with practical, on-the-job training (Leadership academy has its purpose but does not provide the kind of training necessary for succession planning)
        - Similarly, just because you have training does not mean you are a leader
- <u>No guarantees</u>
    - Don't want people making assumptions that because we have a succession plan that there is guaranteed successorship
    - Need to expressly state this fact (no guarantees) within succession planning policy

- <u>Cultural/Communication barriers</u>
    - Tendency to hire outside is discouraging in context of succession planning
    - Attitude must change; a balance must be reached (50% internal/50% external)
    - Need to communicate what positions may be becoming available (a few years ahead if possible) so that current employees can have chance to prepare themselves, hone skills
    - Seems like there is a communication problem – once people leave we don't feel like we can talk to them; institution burns bridges with departing employee

- <u>Specific ideas for succession planning process:</u>
    - Archiving/Capturing oral histories
        - Provide systematic way to collect knowledge and provide opportunity for departing employees to leave legacy
        - Ask for info in interest of helping institution (BEFORE employee leaves)
        - We need to be taking oral histories to try and capture the institutional knowledge that could be lost with people leaving
        - By recording irreplaceable knowledge we can eliminate some of the reinventing and recreating that goes on when a person leaves
    - Retiree pool (with written policy/procedures)

- Could fill part-time temporary or permanent needs
- Can serve as prime source for work force training (need day-time instructors in WCS)
- Can serve as stop gap (though not a long term fix for succession planning
- Create directory/contact list of interested retirees (Institution-wide)
    - Find out areas of future interest
    - Collect information on an on-going basis

- Interim positions
    - Use the interim position as a training, trial period in the succession planning process; accompany with a salary commensurate with the position
    - This would need to gain acceptance as part of the process

A Pilot Look at the Human Resources Department

This is a snapshot of a small (12 employees) but vital department at the College.
The function of the Human Resources Department is important to the daily operations of the College, especially as it relates to payroll, employee benefits, hiring, employee relations and compliance. Thirty –three percent of the office is staffed with employees aged between 50 years and 60 plus years and forty-two percent of the office is staffed with employees aged between 40 years and 49 years old.

Age Distribution of Employees within Human Resources Department at OCC

Job Title	**Employees**	**Age 20-39**	**Age 40-49**	**Age 50-54**	**Age 55-59**	**Age 60+**
Vice President	1					X
Associate Vice President	1		X			
Dir. Employee Relations & Diversity	1					X
Manager, Workers' Compensation Employee Relations & Immigration	1		X			
Specialist, Employment	1	X				
Specialist, Payroll	1		X			
Specialist, Benefits	1		X			
Specialist, Human Resource Information	1		X			
Secretary to VP	1	X				
Administrative Assistance	3	X			XX	
Total	**12**	**3**	**5**	**0**	**2**	**2**

A succession plan would benefit this department since the statistics show that 33% of the employees are eligible for retirement within a five year period based on age. This statistic could be even higher when years in the State system are also taken into consideration.

Interview with Employee Currently Holding Critical Position in the Human Resources Department: The following are notes to an interview conducted with the payroll specialist on September 19, 2006. Due to the Human Resources staff being few in numbers, this position is critical with regard to certain responsibilities.

Notes from Interview of Payroll Specialist, George Pollauf - 9/19/06

1. Job duties-
There are quite a few intricacies to the processes of George's job (over 1,800 paychecks go out each biweekly pay period)

2. Type of training George underwent when he first came on the job in 1985-
There was little to no training for the position because the assistant left her position the day he started. Lots of on-the-job training!

3. How prepared is the college if George was to leave the position?
Not very prepared! Confident that current Human Resource Information Specialist could take care of parts of the job (Barb has assisted in entering data for the payroll for 3 to 4 times). The fact that Banner is in place makes many of the processes a little less cumbersome. However, nobody is currently prepared to take on the biweekly, monthly, quarterly and annual reports. Also, tax issues and troubleshooting make up a lot of the job which can be difficult to deal with unless you have actually gone through the job duties for a substantial period of time.

4. Minimum qualifications for a successor-
Minimum of Associate's Degree (Bachelor's in Accounting would be helpful, but payroll is even more specialized)
5-6 years of payroll experience
Familiarity w/ Ohio law (tax requirements)

5. Job shadowing (optimal time spans)
3-6 months of shadowing would be the minimum amount of time that would be useful for someone to learn the job. However, some situations come up only once a year, so the trainee would ideally want to experience those situations for the first time while George was still available to assist.

6. Feelings about Succession Planning
Succession planning would be very helpful/necessary. Training time needed by trainee would depend on the experience that the person brought in with them (experience in Banner, experience in higher ed, etc). One quarter would be the minimum time for some type of overlap.

7. Level of comfort with different possibilities for succession planning
George indicated that he would be comfortable with training/mentoring person(s) prior to his actual retirement (at least 1 month). He also would be comfortable coming back to assist with the transition post-retirement on a part-time/temporary basis (independent contractor/consultant role). George indicated that he does not believe there is a required waiting period for a retiree to be rehired as long as they are rehired at a lower pay rate. Another transition technique mentioned was the possibility of an on-call system where George would be available to assist with troubleshooting or as needed.

8. Determining transition needs

The retiring employee should be involved in determining what the best succession plan for that position would be. Different positions would have unique needs and the current employee has the most knowledge about the position. Different people would likely have different comfort levels with specific plans. (i.e., not all people would be interested in mentoring or being actively involved)

9. Post-retirement re-engagement in different capacity
George would possibly be interested in re-engaging at the institution in a different capacity upon retirement if that opportunity presented itself.

Lastly, George emphasized that he believes that knowledge retention and transfer is very important to the operations, morale and level of trust at an institution.

Advantages and Disadvantages of Succession Planning

Advantages:

- Identifies potential candidate within. Aids in filling long-term and emergency leadership needs.
- Ensures continuity of leadership.
- Develops institution's own leaders in a positive fashion.
- Provides better information for known internal candidates than external candidates.
- Aids in aligning human resources with strategic directions of institution.
- Helps define professional development opportunities for employees.

Disadvantages (or obstacles):

- Retirement options sometimes fall into the 'don't ask-don't tell' attitude.
- There can be a perception of favoritism with pre-determining candidates (the anointed ones).
- It requires effective planning by managers at all levels and is not another HR plan.
- Potential employees who could be interested in another position can be overlooked.
- Requires buy-in by senior leaders.
- Requires implementation, follow-through, assessment and measurement.

Improvement Model

STEP ONE: Identify Critical Positions

STEP TWO: Identify Competencies

STEP THREE: Communicate Possible Opportunities

STEP FOUR: Identify High Potential Employees

STEP FIVE: Prepare Employee Development Plan

STEP SIX: Evaluate Succession Planning Program

The Six Steps

STEP ONE: Identify critical positions
Critical positions are those that are essential for the College, department, division, work unit, or team to achieve the necessary work results (Directors, Assistant Directors, Supervisors, Middle managers/Specialists (who supervise other staff) and, Key Support Staff). ****Note: 71% of organizations using succession planning techniques have incorporated this step (Identifying critical positions) into their process.*

1. Separate teams should be composed to identify key positions within each department.
   - Each team should/could consist of a department's senior management (2-3 people)
   - Executive Representatives for Succession Planning will convene as members of each team (During the pilot study phase this would be the Ad Hoc Committee's role)
     - Executive Representatives would include selected members of President's Council (2-3 people) and selected personnel from Human Resources (2 people)
     - Teams convene for to identify key positions within each departments in a collaborative decision making process

2. Team to use departmental organization chart as a guide in identifying key positions.
   - Look for positions with key characteristics:
     - Position requiring specialized knowledge/skills
     - Position requiring leadership competencies
     - Position requiring deep historical perspective of College
     - Position supervising substantial number of employees

3. Team to identify *estimated* time frame in which position may need to be filled (e.g., within next year, 1-3 years, 3+ years, no replacement needs to be predicted)

STEP TWO: Identify Competencies Needed
The competencies needed for a job are best initially identified by the person currently holding that position with collaboration from supervisor. The process will assist in keeping job descriptions accurate and updated as well as assessing the need for position realignment, restructuring, or duty modification. ****Note: these issues were identified as current critical weaknesses of OCC during our background research.*

1. Charge person currently occupying the identified position with initially identifying competencies (in collaboration with supervisor) using **Succession Management Plan form (Appendix B).** Behavioral examples to be listed.
2. The working document would then go through final review with supervisor noting how this employee's present competencies compare to that required of the anticipated opening.
3. Document to be forwarded on to department head, noting how this employee's present competencies compare to that required of the anticipated opening. Department head will bring competencies back to the Executive management team for review.
4. Executive management team to review competencies as indicated on **Succession Management Plan form (Appendix B),** noting how this employee's present competencies compare to that required of the anticipated opening.
   a. Reassess this position and the competencies considering possible realignments
   b. Engage in purposeful restructuring if deemed necessary

STEP THREE: Communicate the Process, Possible Opportunities and Competencies

Inform all employees of the succession planning process as well as possible job opportunities that are anticipated over the designated time period. ***Note: Communicating the succession planning process has been rated as one of the three most important succession planning activities for organizations engaging in succession planning. Also, as our relations diagram and focus group data indicate,* ***communication*** *is one of the most crucial aspects if the College is to institute a succession planning process.*

1. Inform employees of the succession planning process that the College intends to use.
    - Provide campus-wide informational sessions or workshops to explain the new initiative and process
    - HR might create an electronic resource which would communicate the succession planning process to all employees
2. Continuously inform employees of the possible position opportunities that may be arising, indicating the estimated time frame to fill (e.g., within next year, 1-3 years, 3+ years).
    - Use PeopleAdmin for College-wide communication of opportunities
    - Inter-departmental communication process in addition to campus-wide communication
3. (Simultaneously with communicating opportunities) Communicate key competencies of a position.
    - Use PeopleAdmin for College-wide communication of position competencies **Succession Management Plan form (Appendix B)** can be forwarded to HR
    - Inter-departmental communication process in addition to campus-wide communication can come from director/supervisor or through distribution of core competencies **Succession Management Plan form (Appendix B)** by person currently holding the critical position

STEP FOUR: Identify High-Potential Employees

A high-potential employee is someone who has the capability to advance to one of the following:

1) A critical position
2) A higher level of responsibility or
3) A higher level of technical proficiency

1. Identifying Potential Employees can be accomplished through several methods:
    - Management Driven: incumbent identifies the employee(s) who are in their view best qualified to move in the position
    - "Pools": these employee are selected by a task force of senior managers (with assistance from Human Resources) who go through a list of all employees above a certain level and assess which employees should be identified as high potential
    - Top-down/bottom-up: Senior management determines required competencies and notifies all employees at a pre-determined level. Employees determine whether or not they are in interested in participating in development training and programs

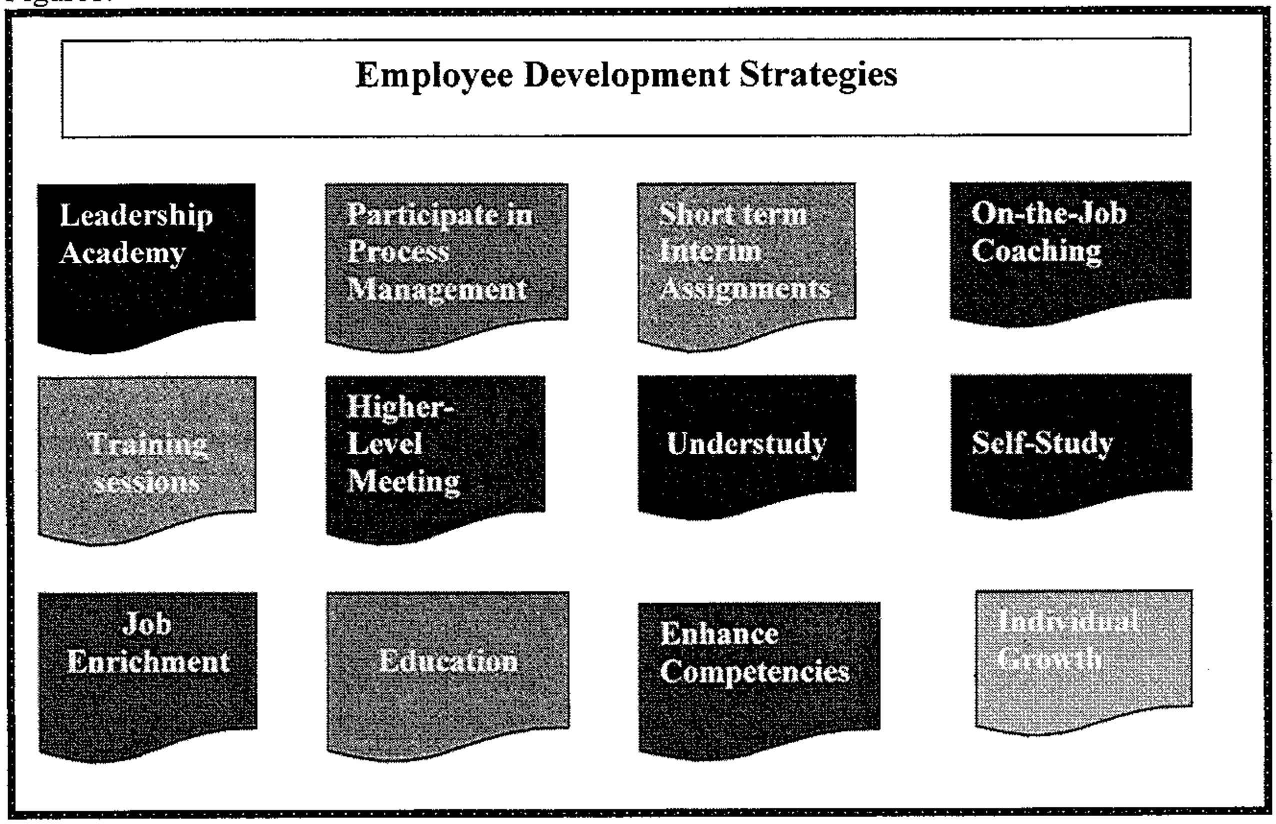
STEP FIVE: Prepare Employee Development Plan

1. With the employee, the supervisor will prepare an individual development plan that outlines specific activities that the employee can participate in to develop needed competencies.

Activities can include job shadowing, attending meetings, training session, etc **(See Figure 1)**

2. Stress that participation in the employee development plan does not guarantee promotion, but is intended to assist them in developing the needed skills should a vacancy of position occur.
3. Include a timetable with milestones for assessing progress
4. Select mentors/coaches from within the organization who can offer the necessary guidance and support and are committed to the succession plan
5. Track developmental activities using **Individual Learning Plans (Appendices C & D)**.
    - Individual learning plan (Appendix C)
    - Individual Learning Plan for Leadership Positions (Appendix D)

Figure1:



STEP SIX: Evaluate Program

1. Evaluate Participant Satisfaction and Progress (Individual-level)
    - Evaluate employees' satisfaction with Individual Development Plan
    - Document employee's progress through developmental experiences
2. Evaluate Organizational Results
    - What percentages of vacancies in positions are filled internally?
    - How quickly are vacancies filled?
    - How quickly are internal replacements able to perform to the level required in the position?
    - Based on the results, what successes or failure in the organizational plan can be identified?

Gantt Chart

Project Timeline	Jan. 2007	Feb. 2007	Mar 2007	Apr. 2007	May 2007	Summer 2007	Fall 2007	Spring 2008
Steering Committee to select Ad Hoc Committee members. Including but not limited to representative(s) from: • President's Council • Human Resources • Others								
Initial Start-up meeting with Process Mgmt Team								
Committee Planning • Meet bi-monthly								
Research Software Support • Consider PeopleAdmin • Consider other products								
Identify department to implement succession plan								
Make semesterly updates to Process Management Team								
Link software to pilot study • Apply software to process • Assess effectiveness/cost								
Process management team to report out								
Ad Hoc Committee submit results and recommendations regarding full-college implementation to President's Council								

Alignment with AQIP

Helping students learn	When key positions have potential candidates already identified, everyone feels better about serving students.
Valuing people	This plan will recognize the potential talents and skills of college employees as a resource for succession.
Leading and communicating	Senior management can communicate employment needs to college employees for potential involvement in filling job gaps that will occur.
Supporting institutional operations	Operations of the college will avoid training periods that slow or interrupt service, due to retirements.
Planning continuous improvement	When college employees are made aware of other job classifications that could be available, due to retirements, etc., advance planning can be put into place to succeed employees into positions.
Building collaborative relationships	Communicating potential openings and mentoring interested employees will help build successful relations throughout the college culture.
Understanding student's and other stakeholder's needs	Our students are our success. Proper planning for succession will make our job easier in meeting our mission.

Recommendations of the Succession Planning Process Management Team

We are recommending the following systematic improvements:

Establish an ad hoc committee to oversee the following charges:

- **Research possible software systems and cost (e.g. PeopleAdmin) to integrate succession planning for effectively managing and communicating the necessary data.**
- **Run a pilot project of a departmental succession plan based on the improvement model suggested.**
- **Link software (e.g. PeopleAdmin) to the pilot succession plan**
- **Analyze and report back findings on all charges**

Conclusion

SUCCESSION PLANNING PROCESS
THANK YOU!

The Succession Planning Process Management Team would like to thank the following individuals for assisting and allowing our team to work on this very important process:

- Dr. Christa Adams for leading us into the future as a "Team"
- The Board of Trustees for their support for "continuous improvement"
- Dr. Stan and Theresa Jensen for their knowledge and guidance through this process
- The Steering Committee for giving us the opportunity to present our ideas
- Our champions- Pat Jezak and Sharon Stein for serving as wonderful resources and giving unwavering support
- The employees who actively participated in our focus group discussion
- George Pollauf for his valuable insight into this process during our interview
- Our supervisors for allowing us to participate into this wonderful process

Appendix A

Focus Group Questions

1. What comes to mind when you hear "succession planning?"
2. Can you identify advantages of having a succession plan in your place your position?
3. Is there currently anyone in your department or within the college prepared to handle your position?
4. What types of training programs do you believe would be helpful to assist employees in progressing within the institution?
5. How might Owens take steps for collecting knowledge that could be lost as a result of retirement? What barriers exist?
6. If asked today, would you participate in an employee's enhancement program – you as mention – such as on-the-job coaching or shadowing? Why or why not?

Appendix B

SAMPLE

Succession Management Plan

Instructions: The manager currently occupying the key position (Department Deans, Department Chairs, or Middle Manager) completes Steps One and Two on this Form and distributes to all staff reporting directly to him or her. Each of these staff members then works with their supervisor to complete an Individualized Learning Plan (Steps Three and Four). Evaluation of the program (Step Five) is reported on the Succession Management Evaluation Form by any upper manager occupying a key position. These completed Evaluation forms shall be submitted through the chain of command and ultimately packaged for the review.

Step One: *Identify a Key Position for Succession:* Payroll Specialist

Step Two: *Identify Competencies, Responsibilities, Duties, Tasks, and Essential Job Functions of this Position. Then list specific examples of how these competencies, functions, etc. are exhibited in this job. (Use additional pages as necessary).*

Competency, Responsibility, Duty, Task, Essential Job Function	Behavioral Examples
Time Management	Assures that all matter relating to payroll are completed for distribution of payroll every other Thursday at 4:30 p.m.
Technology skills	Able to use Banner, Word and Excel at the intermediate level.

Signature of Key Position Manager

Date

Appendix C
SAMPLE
Individual Learning Plan

Desired Job (title or classification) Payroll Specialist

Name: Marvelous Mark

Department: Human Resources

Current Job Title: Financial Aid Coordinator

Date Prepared: 00/00/2006

What are my strengths?

What are my areas for improvement?

What are my goals?

What is my educational status?

Individual Learning Plan

Name: ______________________ **Date Prepared:** ______________ **Page:** ______

SMART Objectives:
Specific Development objective: What result you want?
Measure: How you will know?
Activity: What kinds of things will you do?
Resource: What you will need to accomplish objective?
Time Frame: How long will it take and how often will you check?

Development Objective	Measures	Activities	Resources/Support	Time
Increase knowledge of Retirement systems.	Increase knowledge by 25% in 2005	Attend classes on related retirement system.	Work with current expert in depart on a weekly basis for 1 hour; supervisor's approval.	Completion date July 2007

Appendix D
SAMPLE
Individual Learning Plan
For Leadership Positions

Directions: Use this Individual Learning Plan to help develop the skills for higher-level leadership positions. Work with your manager to reach agreement on objectives, strategies, etc.

Employee's Name ______________________	Job Title ______________________
Department ______________________	Years in Position ________________

Manager's Name ______________________	Job Title ______________________
Department ______________________	Years in Position ________________

Today's Date ______________________ Plan Covering ________ to ________
Date Date

Below list the competencies, activities, responsibilities, duties, tasks, or essential job functions of a higher-level leadership position in which you have developmental needs and to which you aspire.

____

____

____

____

Learning Objective	Methods and Strategies to meet the Objectives	Resources Needed to Achieve Objective (Information, Money, Training, Equipment, Time, etc.)	Deadline or Benchmark Dates	How success of each learning objective will be measured	Verified? Yes ( ) No ( )
Example: I want to learn to conduct public meetings and make effective presentations.	I will take over public meeting facilitator role from department head. I will need to take a PowerPoint class and a Presentation Skills class.	1. Presentation Skills class 2. PowerPoint class 3. Time to take classes 4. Money for classes if not offered by HR 5. Time to meet with dept. head to do run-through of PowerPoint presentation	Three months to complete classes. Six months to complete objective	Dept. Head will observe me conducting the meeting and will assess how well I prepared for the meeting by seeing how I handle questions from the audience, and by getting feedback from audience members.	

Learning Objective	Methods and Strategies to meet the Objectives	Resources Needed to Achieve Objective (Information, Money, Training, Equipment, Time, etc.)	Deadline or Benchmark Dates	How success of each learning objective will be measured	Verified? Yes ( ) No ( )

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Steering Committee Feedback

Succession Planning Team
Sharon Stein & Pat Jezak, Sponsors
11/30/06

Ideas for Improvement	**Support**
Establish an ad hoc committee to oversee the following charges:	______________

- Research possible software systems and cost (e.g. PeopleAdmin) to integrate succession planning for effectively managing and communicating the necessary data.
- Run a pilot project of a departmental succession plan based on the improvement model suggested.
- Link software (e.g. PeopleAdmin) to the pilot succession plan
- Analyze and report back findings on charges to President's Council