

STAFF DEVELOPMENT
MANAGERS - SHARING GOOD
PRACTICE CONFERENCE
EMFEC

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SUCCESSION PLANNING OVERVIEW

Aim of the Session

- To discuss and share ideas on the feasibility of implementing Succession planning into Public Sector organisations

Objectives of the Session

- To develop an understanding of succession planning
- To identify the critical roles within our organisations and
- To consider different methods and styles of SP that you may use

Activity 1

What is Succession Planning?

'A process through which an organisation assures necessary and appropriate leadership resources for the future in the form of a talent pipeline with the capabilities of sustaining the organisations long-term goals'.

ACCT Association of Community College Trustees

'The process of identifying successors- both immediate and long term- for key posts and of planning their career paths accordingly'.

Source Wendy Hirsh 2000

'Developing strategies to determine the optimum mix of internal and external recruitment'. www.cipd.co.uk

What is Talent Management

- The term 'talent management' refers to managing the entire employee lifecycle, from attracting and hiring to promoting and finding a successor upon retirement
- Source: www.brandon-hall.com



Reasons for Employee Turnover

(CIPD Recruitment, Retention and Turnover Survey 2008)

Promotion outside the organisation	45%
Lack of development or career opportunities	33%
Change of Career	55%
Level of pay	41%
Retirement	19%
Redundancy	22%
Level of workload	19%
Leaving to have/look after children	27%

Reasons for Employee Turnover

(CIPD Recruitment, Retention and Turnover Survey 2008)

Lack of support from line managers	16%
Number of working hours	14%
Ill health (other than stress)	6%
Stress of job/role	19%
Leaving to look after family members (other than children)	13%
Relocation	2%
Other	9%

Should we be planning?

- Responding to the impending retirements of staff and leaders aging out of the Public Sector workforce
- Responding to the anticipated leadership “brain drain” associated with Baby Boomers aging out.
- By 2019 Derby College will lose approximately 50% of their Senior Leadership team to retirement

Should we be planning?

- "The real challenge is transferring their knowledge and talents to succeeding generations of workers," *Management Issues* June 07.
- Colleges rarely engage in the kind of succession planning that private companies do, identifying and grooming specific individuals for senior positions.
- Many organisations concentrate on roles at the top of the organisation but you may also need to consider roles within your organisation that would cause major disruption

Consider this:

If a key member of the leadership team left the organisation how long will it take you to fill that position?

What is a Key position?

'A key position exerts critical influence on organisational activities- operationally, strategically or both'.

William J. Rothwell. Effective Succession Planning 2001

Critical Posts

What are your organisation's
critical posts?

Critical Posts

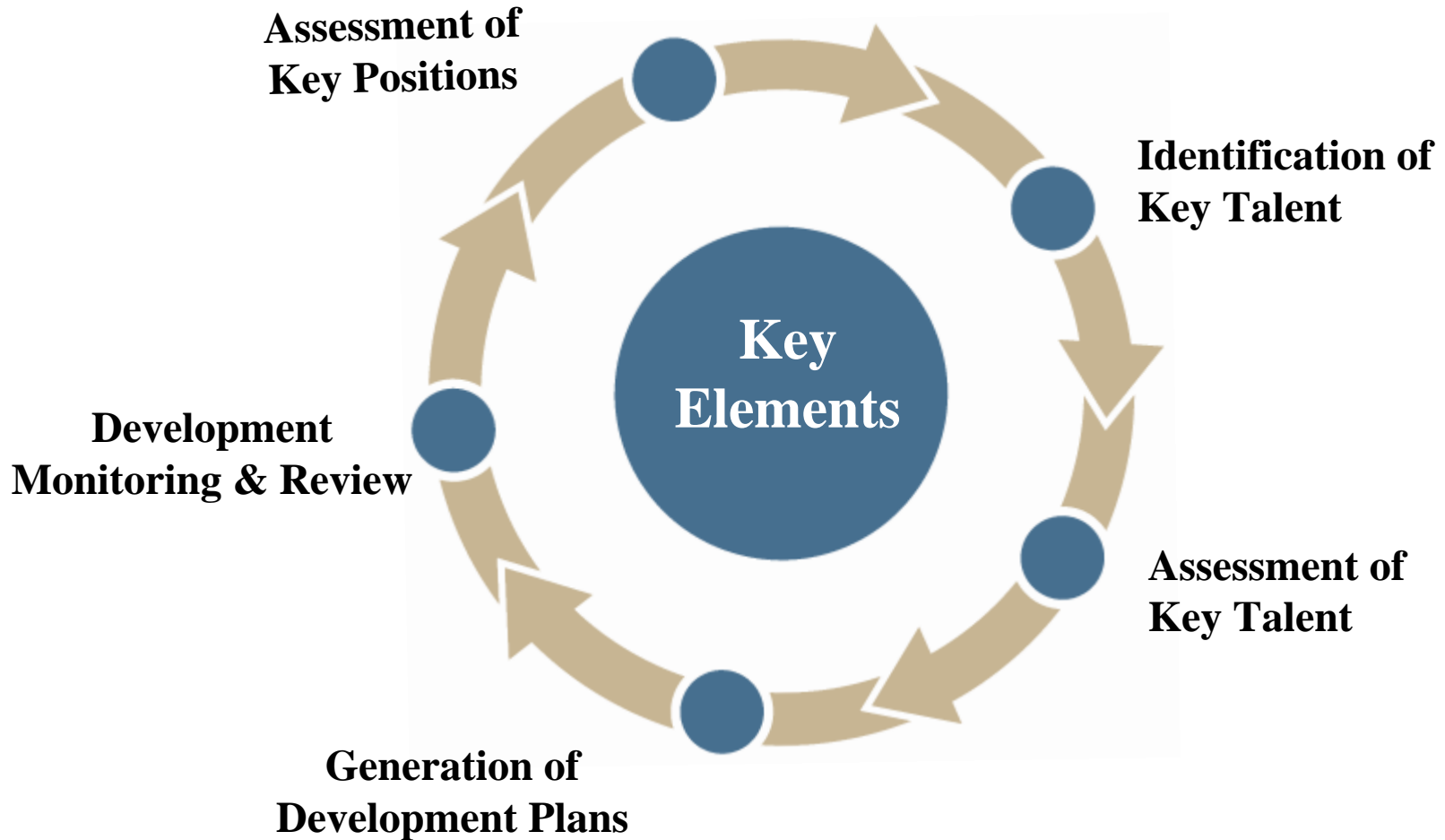
- This process should help to identify those roles that do not need to be succession planned.
- You will also need to complete a risk assessment to identify roles that may prove difficult to fill externally or where internal knowledge is crucial to success. This should be on the succession plan for internal successors.

Why Do You Need a Plan?

A succession plan can help companies find and develop *talented* leaders within their organisations to **drive competitive strategy, reinforce values and successfully secure the future of organisations.**



Succession Planning: Key Elements



Succession Planning: Key Elements

1. Assessment of Key Positions:

- What are the competencies and experiences needed to qualify for each key position?

2. Identification of Key Talent:

- Typically people at the top two levels of the organization and high potential employees one level below.

- Identified by their management's assessment of their

performance and potential for advancement.

3. Assessment of Key Talent:

- For each person on the radar screen, primary development needs are identified focusing on what they need in order to be ready for the next level.

Succession Planning: Key Elements

4. Generation of Development Plans:

- A development plan is prepared for how we will help the person develop over the next year.

5. Development Monitoring & Review

- An annual or semi-annual succession planning review is held to review progress of key talent and to refresh or revise their development plan.

Where Learning Takes Place

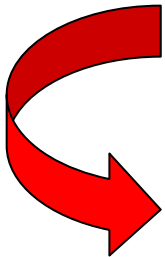
Where do people learn the skills to be effective leaders and managers?

- Job assignments
- Other people
- Formal Training and Development programs

But there appears to be little attention to skills needs "at the top"

Where Learning Takes Place

Where Learning Takes Place...



Challenging Assignments



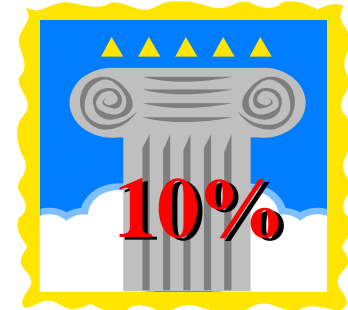
- Action Learning
- Rotational Assignments
- Cross-functional Task Forces

Coaching & Mentoring



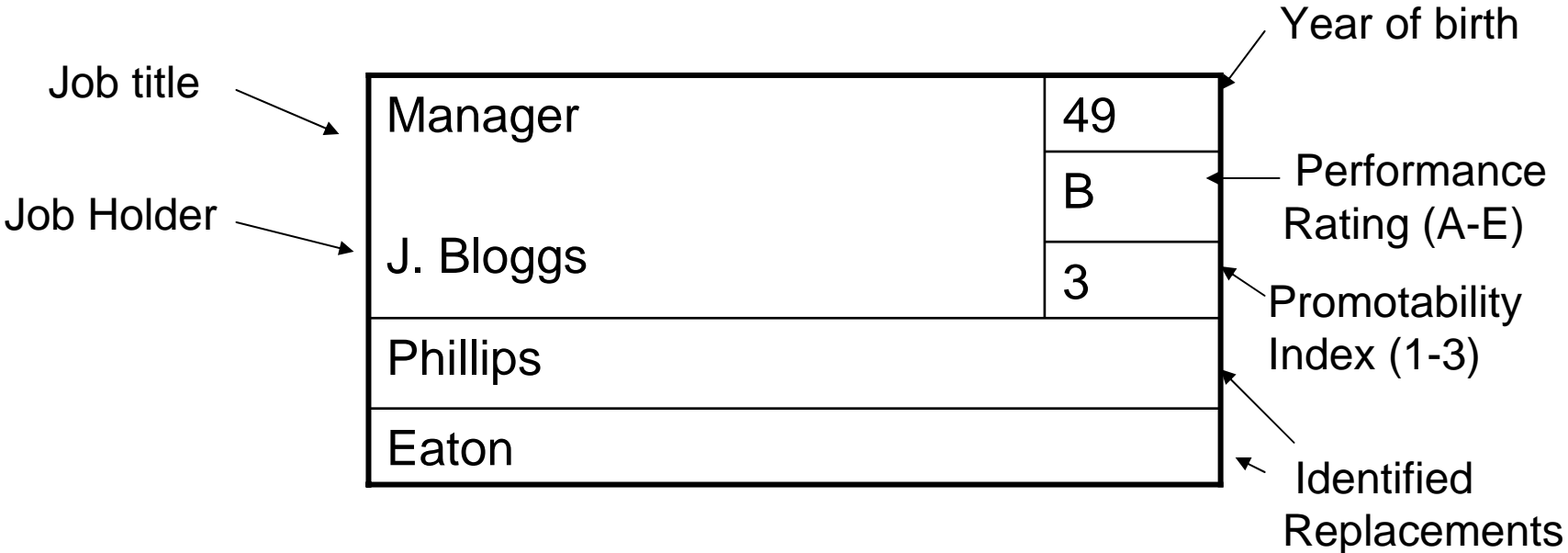
- Development Plans
- Coaching
- Career Mentoring
- Feedback

Structured Learning



- Courses
- Conferences
- Books
- On-line Learning
- Simulations
- Workshops

SUCCESSION PLANNING CHART



Succession Planning-Ratings

Performance Rating:

- A. -Exceeds expectations
- B. -
- C. -Satisfactory performance
- D. -
- E. -Unsatisfactory performance

Promotability Rating:

- 1. -Ready now
- 2. -Likely to be ready during next 24 months
- 3. -Not ready for promotion

Activity 4

Benefits v Risks

Benefits

- Minimising or eliminating gaps when someone moves on
- Capturing knowledge and experience
- Generating a pool of talent
- Encouraging people development

Risks (lack of succession planning)

- Losing irreplaceable skills
- Non sharing of knowledge and expertise
- Managers lacking the necessary skills and expertise for promotion
- Skills shortages leading to inefficiencies

What are you succession planning for?

- For the top roles only?
- For replacement at different levels?
- For critical roles?
- For leadership development?
- For technical competence?

Which system will you use?

- A closed system?
- A semi-closed system?
- A semi-open system?
- An open system?
- Autonomous units?
- A cross-organisational system?

Responsibilities in Selecting Successors

Avoid cloning the senior management

- ❑ Look out for managers identifying employees who are similar to them as having the best potential.
- ❑ The manager shouldn't be the only person to determine what qualities a successor should possess
- ❑ Include others (reportees, peers etc) in analysing the requirements of the post

Key Points

- Establish a transition team
- Conduct an organisational assessment
- Review Institutional Priorities
- Succession planners need to have a clear vision of what the organisations top talent requirements will be in 3-5 yrs time

Key Points

- Identify skills, experience and behaviours and identify any gaps
- Establish Competencies (General, Job-related, and Personal Qualities)
- Involve the Unions
- Ensure Principal is an active participant and supporter
- Ensure Line managers own the process- HR support

Key Points

- Ensure consistency with other people management programs
- Hold employees responsible for their Personal Development Plan
- Emphasise the selection process
- Keep reviewing the planning process

Conclusion

- SP is a forward-looking process
- The key challenge is to anticipate what skills will be needed in the future.
- SP needs to be integrated within a wider Succession Management Model e.g.
 - Recruitment
 - Workforce planning
 - Learning
 - Career Development
 - Performance management

Any Questions?

Thank you

and

Good Luck