

# Succession Planning: The Time is Right Now!





“It’s almost impossible to  
solve today’s problems, with  
yesterday’s solutions.”

– Patrick Ibarra

Are **you**, your **community**,  
and your **workforce**  
changing as **fast** as the  
world around us?

What made you successful  
in the past may not help  
you **survive** and **thrive** in  
the future.



# TODAY'S SPEAKER



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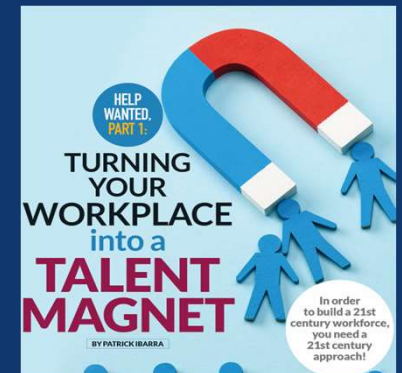
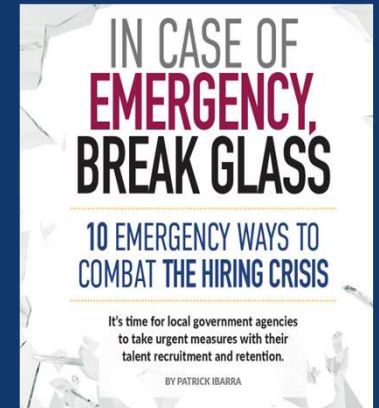
## THE COMPREHENSIVE GUIDE TO LOCAL GOVERNMENT SUCCESSION PLANNING

The time for succession planning in your organization is now, like right now!

BY PATRICK IBARRA

Many forward-looking organizations are pursuing comprehensive and systematic succession planning to ensure that they can lose seasoned, knowledgeable employees without experiencing a disruption in service delivery. More than just training employees, succession planning is about both developing talent inside the organization and implementing ways to recruit more qualified candidates to join the organization. Furthermore, succession planning is not simply replacing positions that become vacant; it's a dynamic process (and not an event) of aligning employee aspirations and talents with the constantly evolving needs of the organization and providing employees with the resources and support they need to grow into new roles.

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Are **you** and your  
**workforce** changing as **fast**  
as the world around us?

What **year** is it in  
your workplace?

Your organization's most  
precious resource isn't  
money, it's time.  
On what are your people  
spending their time?

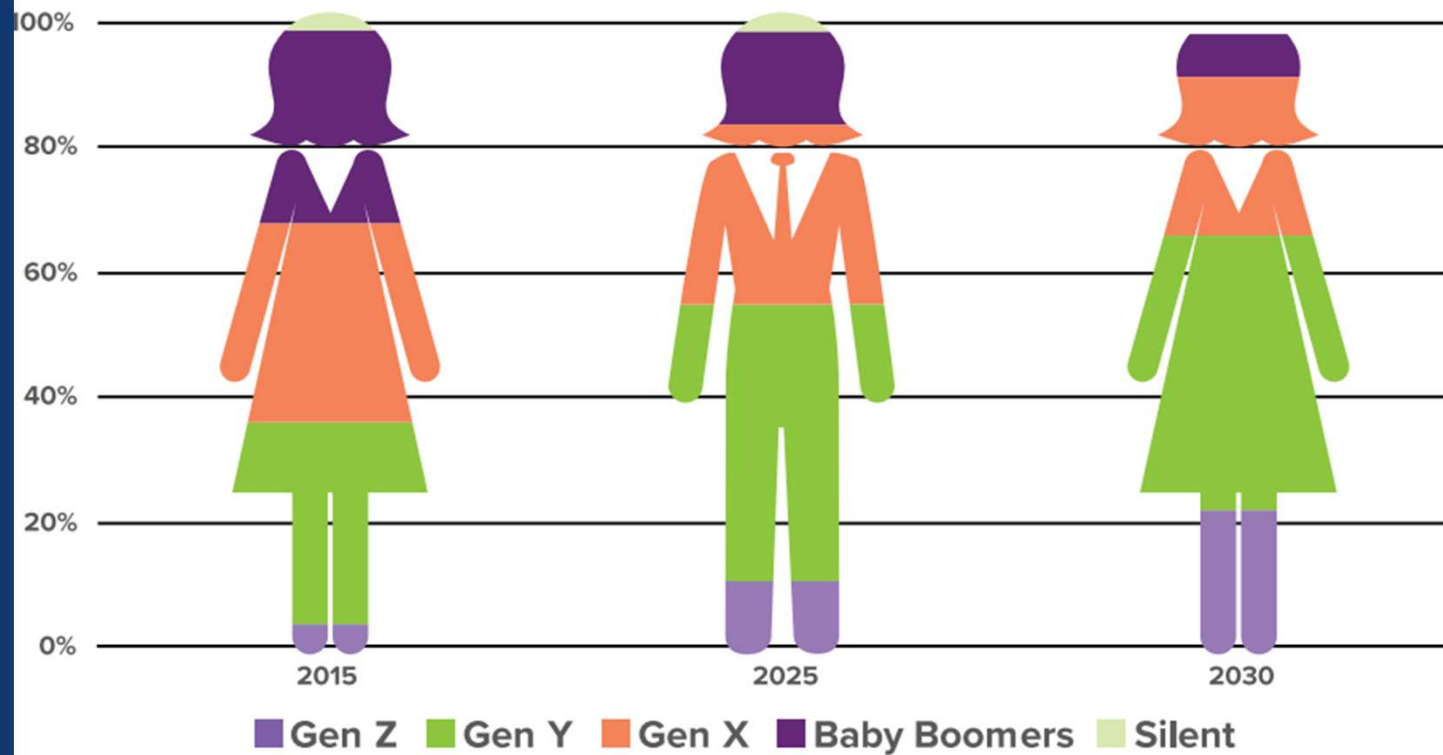


“People aren’t paid to  
work – they’re paid to  
add Value.”

“The Three R’s for  
today’s workplace  
Reimagine, Refresh and  
Reshuffle.”

– *Patrick Ibarra*

## US Labor Force composition by generation





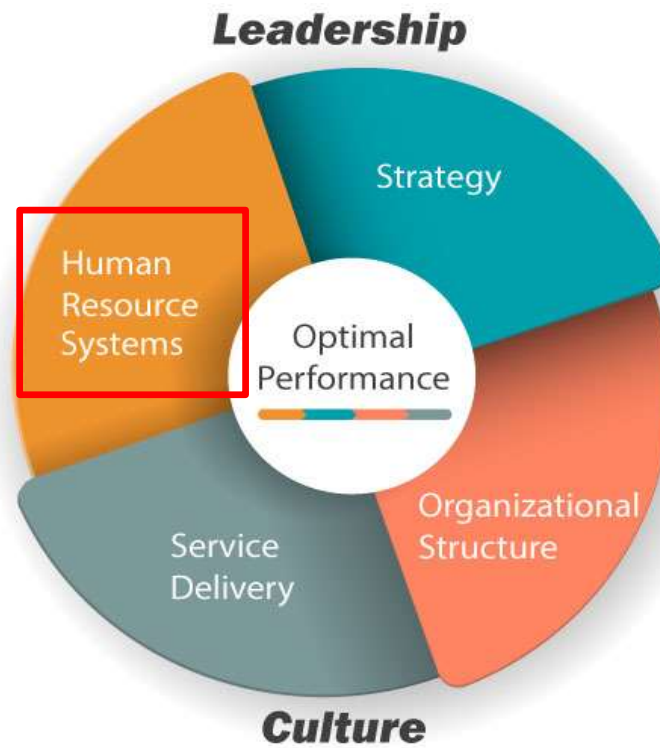
# New Employer- Employee Contract:

- Productive
- Engaging
- Enjoyable work experience

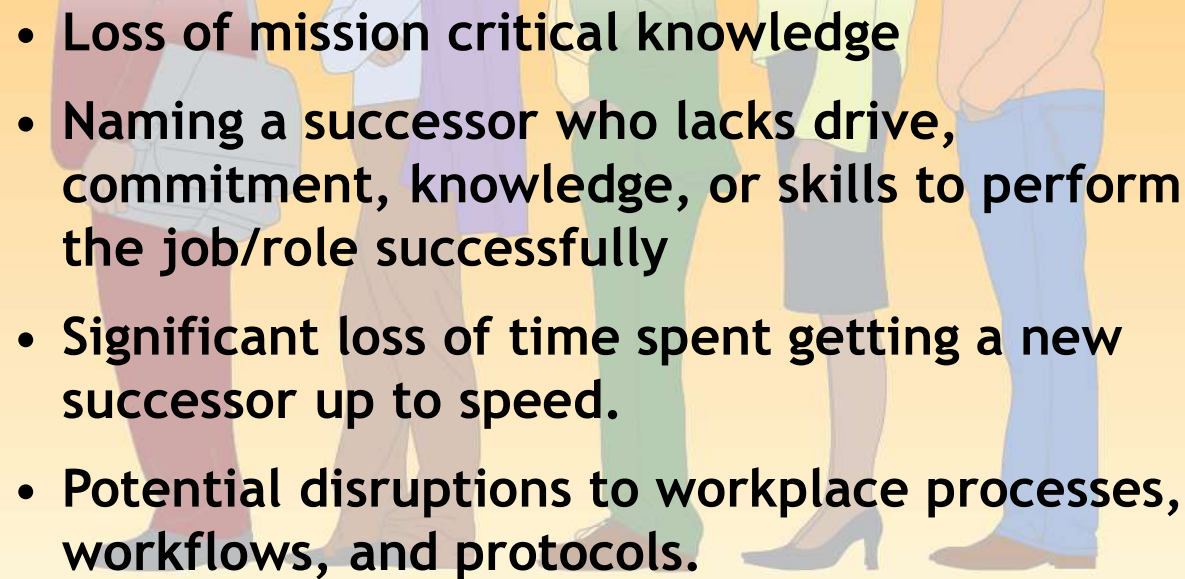


KFA  
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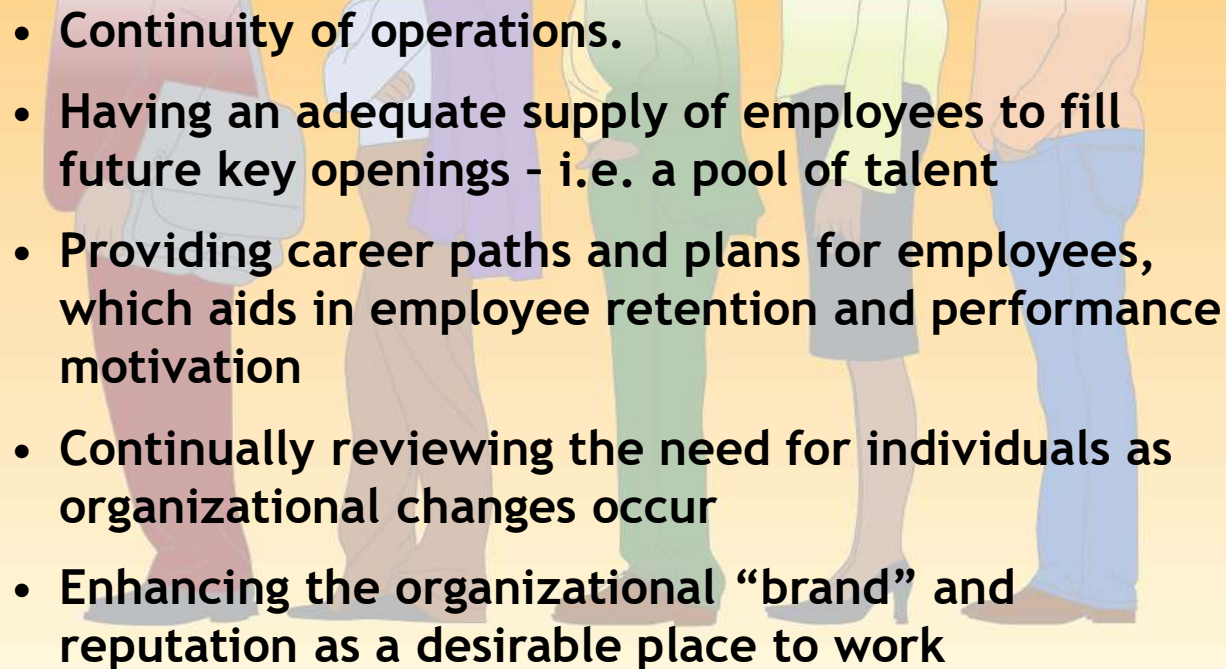




# Why Now?

- 
- Loss of mission critical knowledge
  - Naming a successor who lacks drive, commitment, knowledge, or skills to perform the job/role successfully
  - Significant loss of time spent getting a new successor up to speed.
  - Potential disruptions to workplace processes, workflows, and protocols.

# Values and Benefits

- 
- Continuity of operations.
  - Having an adequate supply of employees to fill future key openings - i.e. a pool of talent
  - Providing career paths and plans for employees, which aids in employee retention and performance motivation
  - Continually reviewing the need for individuals as organizational changes occur
  - Enhancing the organizational “brand” and reputation as a desirable place to work

***Seniority doesn't always  
translate to competence and  
technical proficiency  
doesn't guarantee  
supervisory effectiveness.***

## What is Succession Planning?

*...ensures the continued effective performance of your organization by establishing a process to manage talent and build bench strength.”*



# What is Succession Planning?

*The major focus is that replacements are prepared to fill key vacancies on short notice and that individuals have the development capacity to assume greater responsibilities, exercise increased proficiency and expanded management roles.*

# What is Succession Planning?

*It's not about who is going to fill whose chair in two to three years, it is about the talent and the skill that the organization needs to move the strategy across the finish line.*

# Succession Planning is a Systematic Approach to...



ENSURING THE PEOPLE WHO JOIN THE ORGANIZATION ARE COMPATIBLE WITH THE FIT REQUIRED TO BE SUCCESSFUL.



WHILE NOT ALL EMPLOYEES MAY BE INTERESTED IN PURSUING A PROMOTION AT SOME POINT, A SUFFICIENT NUMBER ARE AND WILLING TO INVEST THEIR TIME, EFFORT AND ENERGY TO POSITION THEMSELVES FOR THOSE OPPORTUNITIES.



MAKING SURE THAT THERE ARE ENOUGH SUITABLE PEOPLE TO STEP INTO ANY SIGNIFICANT ROLE AS IT BECOMES VACANT OR IS CREATED – A PIPELINE OF POTENTIAL SUCCESSORS.



MOTIVATING AND DEVELOPING NEWLY PROMOTED PERSONNEL TO ADAPT TO THE NEW ROLE AS FAST AS POSSIBLE, WITH MINIMUM DISRUPTION.



RECOGNIZING THAT ROLES AND THEIR INCUMBENTS ARE CONSTANTLY EVOLVING.



COMMUNICATING TO THE ENTIRE WORKFORCE THAT TO REMAIN A FULLY QUALIFIED INCUMBENT LEARNING AND GROWTH ARE NECESSARY.

# Replacement Planning vs. Succession Planning

Replacement Hiring	Succession Planning
A narrow approach and is usually focused on trying to quickly avoid a crisis by filling a position in a short time.	Takes the additional time needed to ensure that the decision aligns with the organization's strategic plan and goals.
More restrictive, sometimes forcing an organization to select the best person available at that moment.	More flexible and allows you to focus on selecting the best candidate for the position.
Often a quick fix.	Exhibits a long-term commitment to the organization and to developing individuals in the organization.
Usually based on the current job description and has limited time for additional input.	Allows you the time to further develop the job description to include new directions, expanded responsibilities, or adjustments to the position.
Usually centers on identifying one or two potential successors to higher-level positions.	Focuses on developing pools of talent for key positions at various levels of the organization.
Often uses only input from the incumbent and his or her immediate supervisor.	Uses feedback from multiple perspectives and resources.
May offer advancement as a reward or because of seniority with the organization.	Doesn't just consider whether a person has been in his or her position for a period of time long enough to merit an advancement, but rather looks at the person's abilities to ensure that he or she has the competencies needed to be successful in the new role.





The background of the slide features a landscape with two trees in a grassy field under a cloudy sky. The tree on the left is full of green leaves, while the tree on the right is mostly bare with some green leaves still attached. Numerous green leaves are shown falling from the branches of both trees, creating a sense of movement and change.

Change **before** you  
have to instead of  
**because** you have to.



A photograph of three people sitting in a row of modern, grey upholstered chairs against a plain, light-colored wall. The person on the left is a man with a beard, wearing a white shirt and dark trousers, holding a black folder. The person in the middle is a man with a beard, wearing a white shirt and dark trousers, holding a green folder. The person on the right is a woman with long dark hair, wearing a white shirt and dark trousers, holding a green folder. The entire image is overlaid with a semi-transparent blue filter. Centered over the image is the text "It is not the sole responsibility of HR to hire people." in a large, white, sans-serif font.

It is not the sole  
responsibility of HR to  
hire people.

## Job Candidates are seeking...

- Challenging and interesting work
- Continuous learning
- Excellent management
- Alignment with personal values
- Flexible work environment
- Technologically savvy workplace
- Ability to use own initiative and judgment
- Diverse workforce
- Ability to be part of a team



Hiring is like  
dating...you get what  
you look for.

# FACTORS INFLUENCING EMPLOYEE PERFORMANCE





# CANDIDATE EXPERIENCE

1. Clean, well-branded mobile presence
2. Real-time status on application
3. Timely communication
4. Next time around



Your **Brand** is not  
your logo, it's your  
**Reputation.**

# What's your Employer Value Proposition?

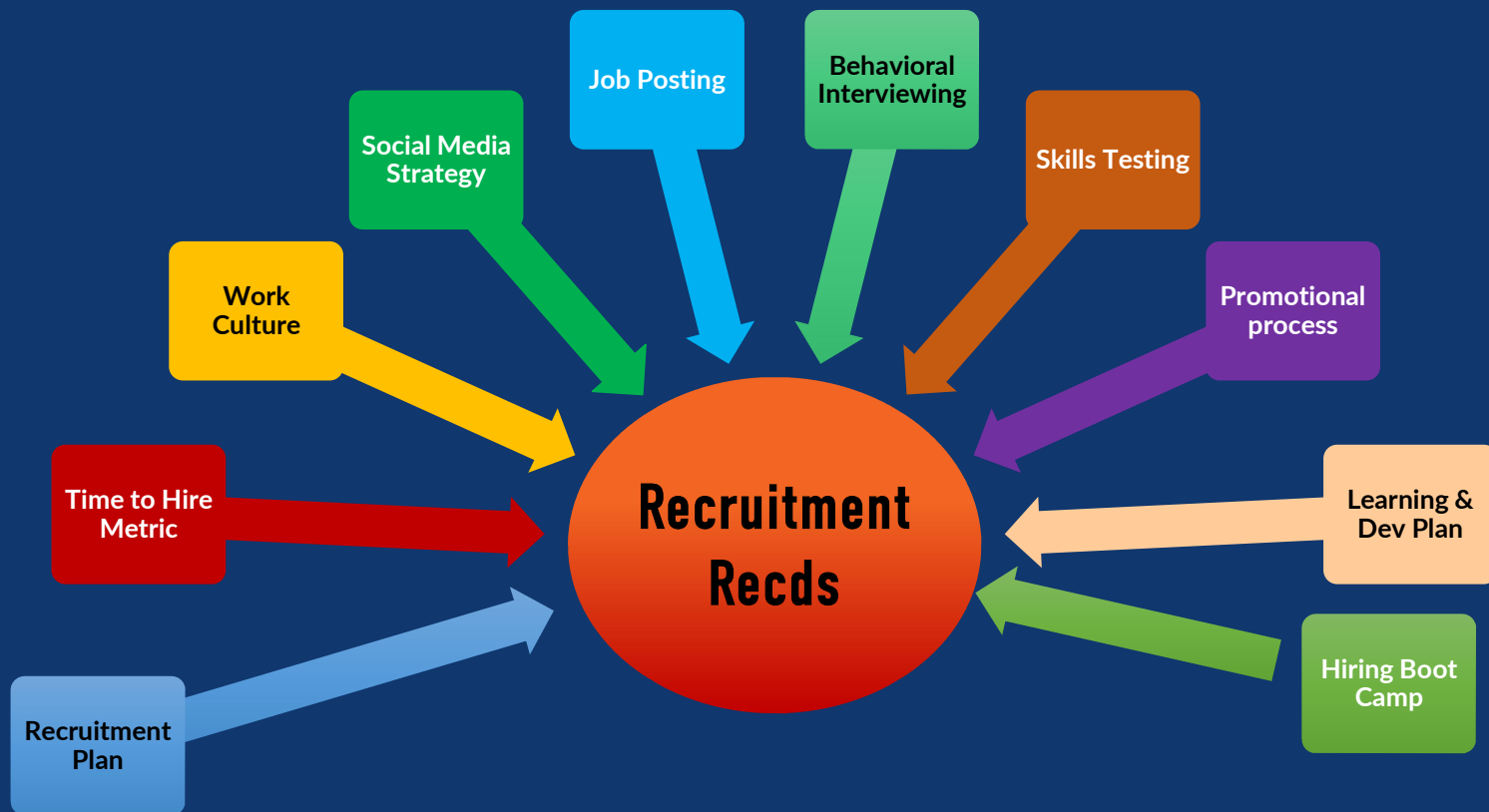


# *Employer Value Proposition (EVP)*

- *What they will gain by working for you.*
- *What the culture is like.*
- *What the organization's mission entails.*

A woman with long blonde hair is smiling and holding a white sign. On the sign, there is a red heart and the words 'my job' written in blue cursive. The background is a blurred outdoor scene.

Do your  
employees have a  
**Job** or a **Role**?



# Change of Mindset/Approach

	The Old Way	The Modern Way
Talent Mindset	<ul style="list-style-type: none"> <li>• Having good people is one of many important performance levers</li> <li>• HR Management is responsible for people management</li> </ul>	<ul style="list-style-type: none"> <li>• Having the “right” talent throughout the organization is a critical source of our success</li> <li>• Every manager is responsible for attracting, developing and retaining talented people</li> <li>• Every manager is explicitly accountable for the strength of the talent pool he or she builds</li> </ul>
Employee Value Proposition	<ul style="list-style-type: none"> <li>• We expect people to pay their dues and work their way up before they get top jobs and higher salaries</li> <li>• We have a strong value proposition that attracts potential employees</li> </ul>	<ul style="list-style-type: none"> <li>• We think of our people as partners and volunteers and realize we have to deliver on their dreams if we are to keep them</li> <li>• We have a distinctive employee value proposition that attracts and retains talented people</li> <li>• Our people feel good about their work experience</li> </ul>

# Change of Mindset/Approach

	The Old Way	The Modern Way
Recruiting	Recruitment is like purchasing; it is about picking the best from a long line of candidates	<ul style="list-style-type: none"> <li>• Think like a “marketer”</li> <li>• Recruitment is a key responsibility of all managers</li> <li>• Hiring process is streamlined including the application/resume</li> </ul>
Growing Leaders	<ul style="list-style-type: none"> <li>• Development is training</li> <li>• Development happens when you are fortunate enough to have a good manager</li> </ul>	<ul style="list-style-type: none"> <li>• Development happens through a series of job experiences, and helpful coaching and mentoring</li> <li>• Development is essential to performance and retention</li> <li>• Training, I mean Learning, is targeted to strengthen the internal bench of potential successors</li> </ul>



1. Why would a talented person want to join our organization and stay with us?
2. Why would a talented person be reluctant to join our organization and stay with us?
3. What does a talented employee need to learn to be considered for a promotion?



**Review MQs**

**Create a Hiring  
Plan**

**Partnerships**

**Performance  
Metrics**

**Candidate  
Experience**

**Open Until Filled**



# SAMPLE INTERVIEW QUESTIONS



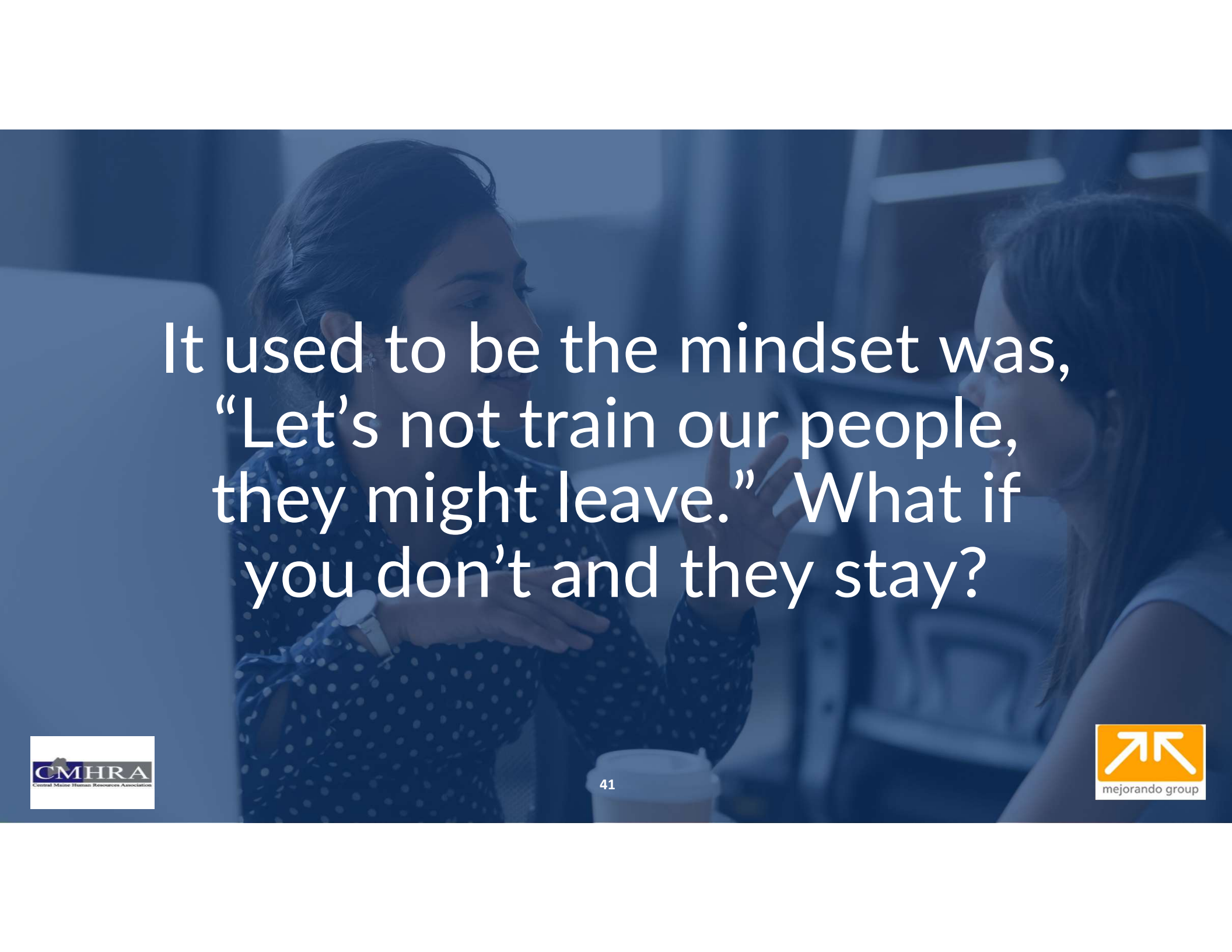
- 01 What do you do when priorities shift quickly?

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- 02 Tell us about a decision you made when you were under pressure.

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- 03 What steps do you take when you need to make an immediate decision but there's little data available?


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- 04 What did you learn last year?

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- 05 Describe the most important attributes in people that you've hired?

A blue-tinted photograph of two women in an office environment. The woman on the left, wearing a dark polka-dot shirt, is gesturing with her hands while speaking. The woman on the right is listening. The background shows office furniture and a computer monitor.

It used to be the mindset was,  
“Let’s not train our people,  
they might leave.” What if  
you don’t and they stay?



A blue-tinted photograph of two women in an office environment. The woman on the left, wearing a dark polka-dot shirt, is gesturing with her hands while speaking. The woman on the right is listening. A white coffee cup is visible in the foreground.

Developing your employees' skills at a rate equivalent to the rate of changes is the key to sustaining high performance.



# LEARNING/TRAINING PROGRAM

## Executives

- Creative Problem Solving
- Leading Change
- Managing Employee Performance

## Mid-Mgrs

- Building Great Work Teams
- Effective Delegation
- Project Management

## Emerging

- New Supervisor
- Providing Effective Feedback
- Time Management

# EMPLOYEE DEVELOPMENT

Job  
Assignments

On-the-Job  
Coaching

Mentoring  
Program

Special  
Projects

“Acting”  
Role

Job Rotation

Conference  
Leader

Shadowing

Task Force  
Assignments



Be successful by  
choice, not by  
chance.

# Outcomes - Benefits



# THE MEJORANDO GROUP

- *Who are we?* Organizational Effectiveness Consulting Practice.
- *What do we do?* Partner with leaders to implement solutions that improve organizational performance.
- *How do we do that?* We provide expertise in:
  - Culture Change
  - Succession Planning & Talent Management
  - Staffing Analysis
  - Facilitation Services – Executive Leadership Teams
  - Leadership and Management Skills Training
- *How do you contact us?* Patrick Ibarra, 925-518-0187 or [patrick@gettingbetterallthetime.com](mailto:patrick@gettingbetterallthetime.com)
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