

## MUNICIPAL SUCCESSION PLANNING

At the recent VLCT Municipal Assistance Center-sponsored training on **Hot Topics and Trends in Municipal Personnel Administration**, Mark Heyman, President of Cope Human Resources, Inc., spoke about succession planning and the characteristics of the so-called “Millennial Generation” or “Millennials,” those who comprise the newest workforce pool. He immediately grabbed his audience’s attention with some interesting statistics: in 1971 a full 71% of professional, local government managers were age 40 or younger compared to just 13% in 2006. That reality, combined with a general workforce culture of more frequent job changing and an ever-increasing workload for local government, highlights the need for municipalities to plan for the future staffing and leadership.

Heyman defines succession planning as the process through which an organization ensures that employees are recruited and developed to fill each key role. The major points of his presentation are summarized below to introduce you to succession planning and help you think about those you’ll be hiring in your municipality. Whether your town is large or small, the principles are the same.

In the past, organizations have tended to be in a reactive mode when position openings occur. However, given the challenges and pressures cities and towns will continue to face, they must consciously cultivate their options for the future. Succession planning does just that by:

- enhancing the recruitment and retention of superior employees;
- developing knowledge and experience among staff, to prepare them for advancement; and
- instituting strategies that transfer knowledge and minimize disruptions.

Effective succession planning entails flexible, creative and proactive thinking. Municipal functions need to be looked at critically to find better ways of working. Opportunities, such as how to effectively use technology, need to be identified. Information and a sense of “ownership” should become widespread throughout the organization and not concentrated at the top. Wider and more effective communication becomes key.

### **Succession Planning Steps**

Here are some general steps toward establishing an effective succession plan:

1. Develop a written policy on succession planning. Identify its goals and the milestones that will be achieved. Be sure the plan is integrated with your identified strategic goals.
2. Get everyone involved whom such a plan might affect. The best plans are developed by a representative group of employees, not solely by senior management. Give employees a chance to be heard.
3. Determine who will oversee the program and have the person learn more about the succession planning process; make sure the person is vested with the appropriate authority and be realistic in terms of who has time to lead and direct this project.
4. Set realistic goals, a realistic timeline and establish measurements, milestones and evaluation methods to review, analyze and address along the way.

5. Identify the key positions and core competencies to be addressed by the plan. Review the organization chart, job descriptions, job responsibilities, and identify the competencies required for each position now and into the future.
6. Evaluate strengths and weaknesses and perform a gap analysis – which current staff have which necessary competencies and where are the gaps? How can those gaps be met through training, hiring, mentoring or other methods? Be creative and think in new ways such as job rotation, online training, job shadowing, and mentoring.
7. Collect data. Where is the institutional knowledge? How can it be written down and transferred and to whom? Which positions are linked to financial performance, productivity, stability and goal achievement?
8. Be sure your budget reflects training needs, recruiting costs and other expenses necessary to fill gaps.
9. Think organization-wide so you can take advantage of opportunities, staff members and synergies across departments.
10. Communication is vital so develop a communications plan. The more transparent the process, the better. Use a positive tone through multiple vehicles such as e-mail, memos, and your website. Think about communicating to community members and other stakeholders, not just employees. Be sure to involve and inform your selectboard or city council. And don't forget the union(s) if you have them. Involve them early in the process to eliminate misunderstandings that can turn into grievances.
11. Follow through is critical. If the plan gets dropped or forgotten, credibility is lost.
12. Review and revise, measure and check, and let the plan be a living document. Update it and change it as often as necessary.

### **The Millennial Generation**

The most entertaining part of Heyman's presentation covered the population that is now entering the workforce. These workers will ultimately occupy key municipal roles, so consider them as you map out your succession plan. Members of the Millennial Generation, sometimes referred to as "Generation Y," were born between 1982 and 2001 so the oldest is currently 26. Culturally, these younger employees differ from Baby Boomers (born 1943-1960) and Generation Xers (born 1961-1981) in many ways. Heyman humorously noted that these are the kids who "got a trophy for just showing up!" Their fathers were much more involved in their parenting than those of previous generations and they are used to having their parents hover over them, problem solving and advocating for them. They never experienced life without a computer and believe that information and, indeed, the world, are only a click away. And, potentially, so is their next job, so if you want to hire them and keep them you need to understand and support them.

The good news for the municipal world is that Millennials are service-oriented, global-, civic- and community-minded, inclusive and optimistic. They love challenge, value guidance from those with more experience, work well with mentors and enjoy pulling together as a team. Millennials are extremely savvy about technology, a trait that can be used to your advantage in many ways, including creating and upgrading your municipal website. The Internet is daily fare for this group, so don't rely heavily on traditional sources of job advertising such as newspaper ads – they don't read them. Keep in mind the town's image and how you might entice interest in employment with your municipality through your website or other online advertising. Sites such

as [www.governing.com](http://www.governing.com) may be appropriate but it may also be helpful to check out funkier avenues such as [Craigslist.org](http://Craigslist.org).

Once you have brought a Millennial on board, you'll need to understand that lifestyle is extremely important to this generation, so they may not relish putting in Boomer-esque overtime hours. They might also be impatient because of the immediate gratification that their technical immersion provides. Time for outside interests is extremely important. And their sense of optimism may make them feel they can easily find a job elsewhere if they are not happy working for you. They are used to multi-tasking and can be uncomfortable without multiple media such as music, e-mail, cell phone and instant messaging. While you obviously need to be aware of productivity and policy issues, don't assume that a Millennial's productivity is impaired by the presence of multi-media. Finally, this is a group that is used to and appreciates positive feedback so let them know when they do something well. This generation has a lot of respect for older generations, as long as the respect is reciprocal.

For succession planning purposes, a great strategy is to team younger employees up with older folks who have institutional knowledge. Let the younger folks be mentored while they gather and record all that institutional knowledge that resides, perhaps, within one person's head. Be creative as you build your municipality's "bench strength." Consider using interim assignments, job shadowing, volunteers and internships.

The overall message on succession planning and the newest and upcoming workforce entrants is: be flexible and creative, think proactively, value all your people and be willing to welcome and appreciate a new generation with some different ideas and new ways of getting things done.

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