

# SUCCESSION PLANNING.

The Time is Right Now!



**Patrick Ibarra**  
**The Mejorando Group**

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

– Patrick Ibarra





# New Employer- Employee Contract:

- Productive
- Engaging
- Enjoyable work experience



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



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





*In order to build a 21<sup>st</sup>  
Century workforce, you need  
a 21<sup>st</sup> Century approach.*

# TODAY'S SPEAKER



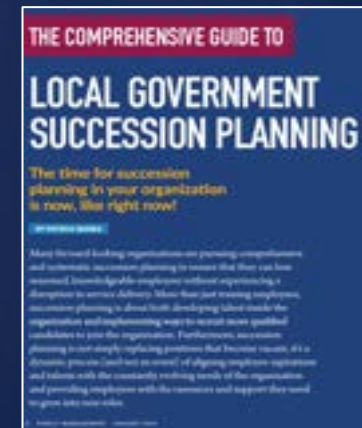
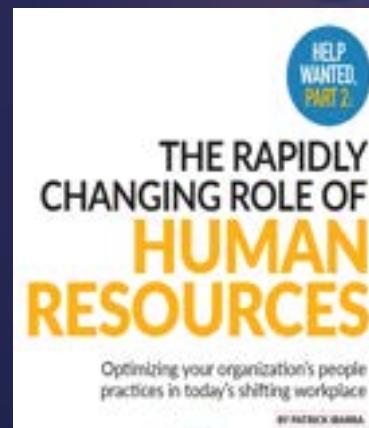
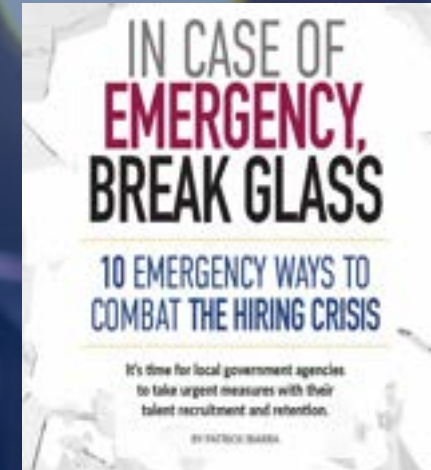
**Patrick Ibarra**

Founder of the Mejorando Group

Former City Manager

(925) 518-0187

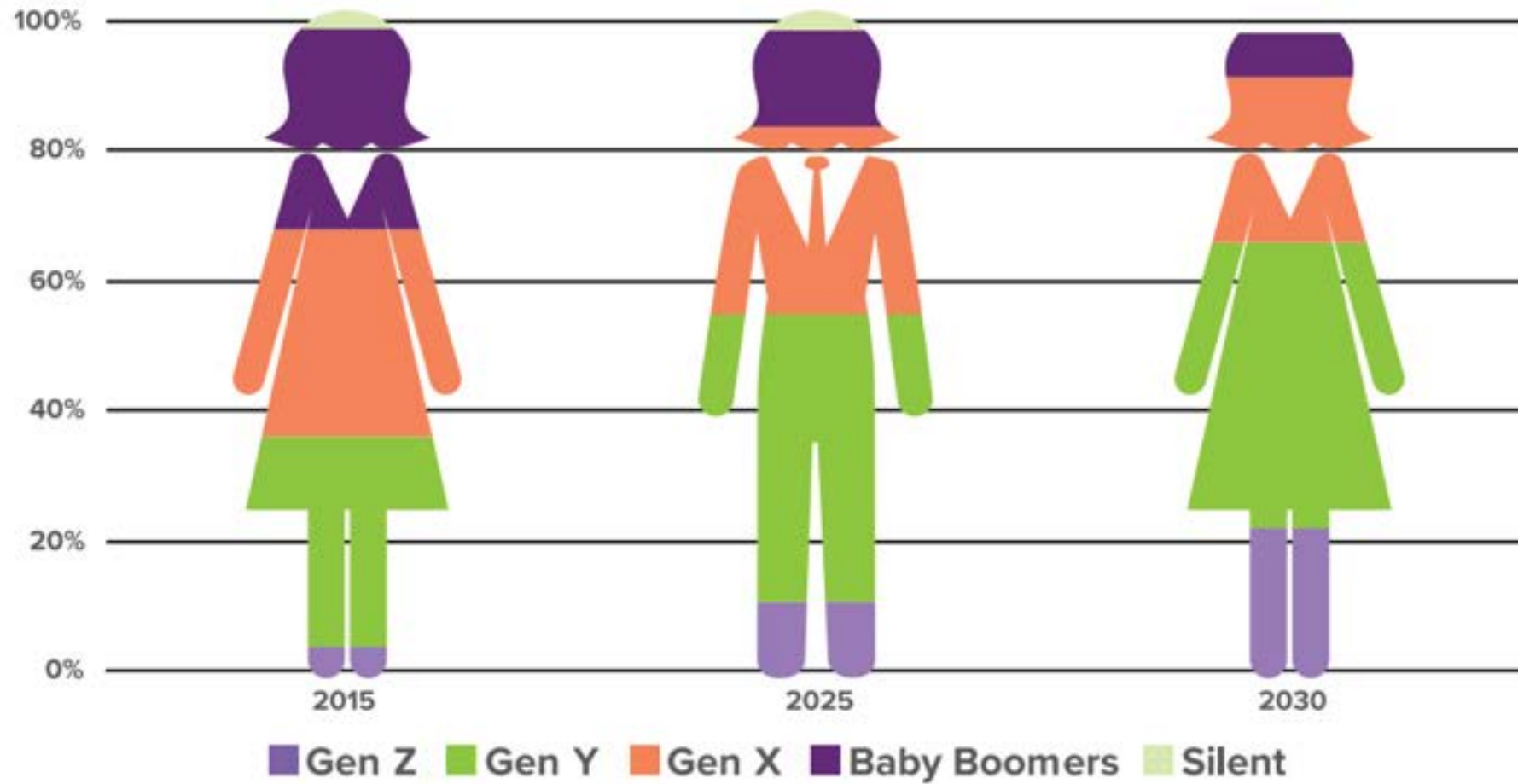
[patrick@gettingbetterallthetime.com](mailto:patrick@gettingbetterallthetime.com)



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



## US Labor Force composition by generation



# KFA

# WFA







# ISSUES OF TODAY & TO

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- Increasing service demands
- Preparing for retirements
- Competitive marketplace
- Growing more leaders faster
- Mitigating potential loss of knowledge
- Reducing talent skills gaps





*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



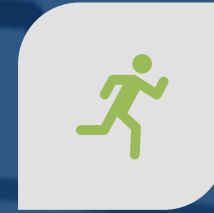
Ensuring the people who join the organization are compatible with the fit required to be successful.



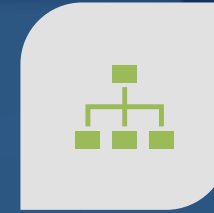
While not all employees may be interested in pursuing a promotion at some point, a sufficient number are and willing to invest their time, effort and energy to position themselves for those opportunities.



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 people to adapt to the new role as fast as possible, with minimum disruption.

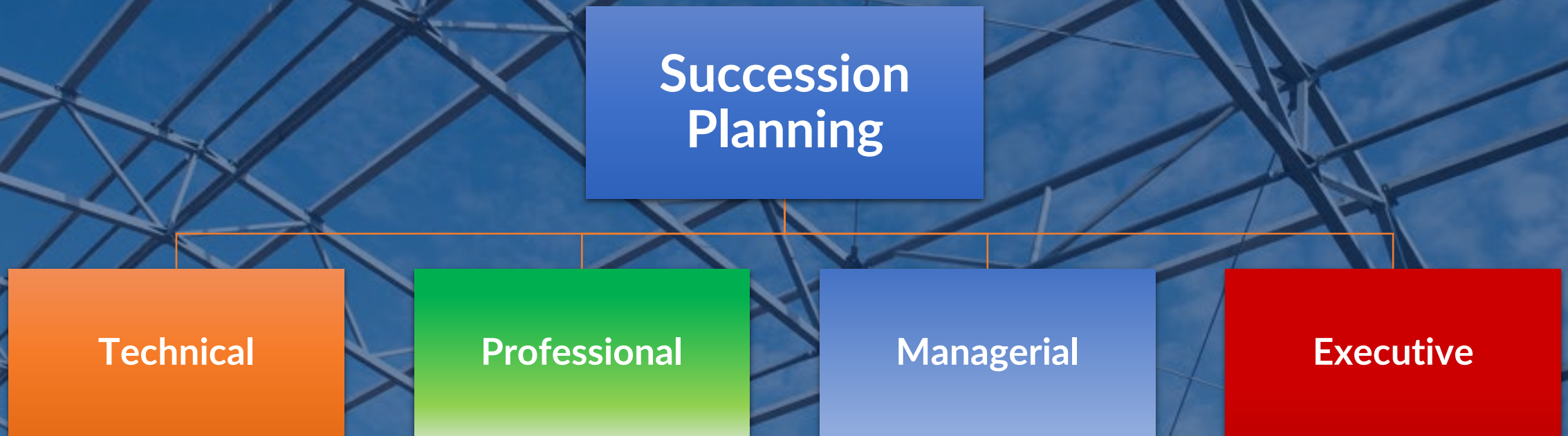


Recognizing that roles and their incumbents are constantly evolving.



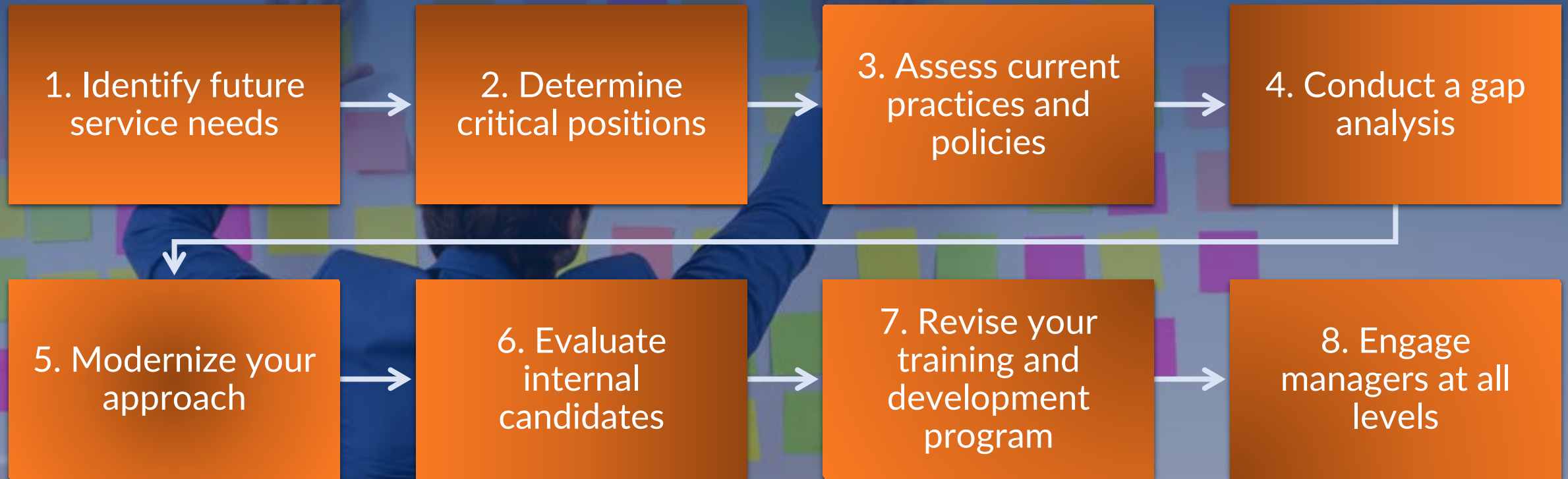
Communicating to the entire workforce that to remain a fully qualified incumbent learning and growth are necessary.

# FRAMEWORK: ACROSS ALL LEVELS





# SUCCESSION PLANNING: THE “H



# 1. IDENTIFY FUTURE SERVICE NEEDS





# 1. IDENTIFY FUTURE SERVICE NEEDS

1. Review your Strategic Plan.
2. How are the demands on team members changing in a way that requires a change in critical skill sets/capabilities?
3. What capabilities will be the highest priority?
4. How will the budget impact service delivery and the workforce now and in the future?
5. What processes will change?

# 2. DETERMINE CRITICAL POSITIONS

## Attrition Data and Retirement Projections: A Worksheet

Department	Total Number of Employees	Age 50-54	Age 55-59	Age 60	Total for Ages 50-60+
Administration					
Clerk					
Community Services					
Finance					
Fire					
Human Resources					
Human Services					
Police					
Public Utilities					
Public Works Department					
Other					
<b>Totals</b>					



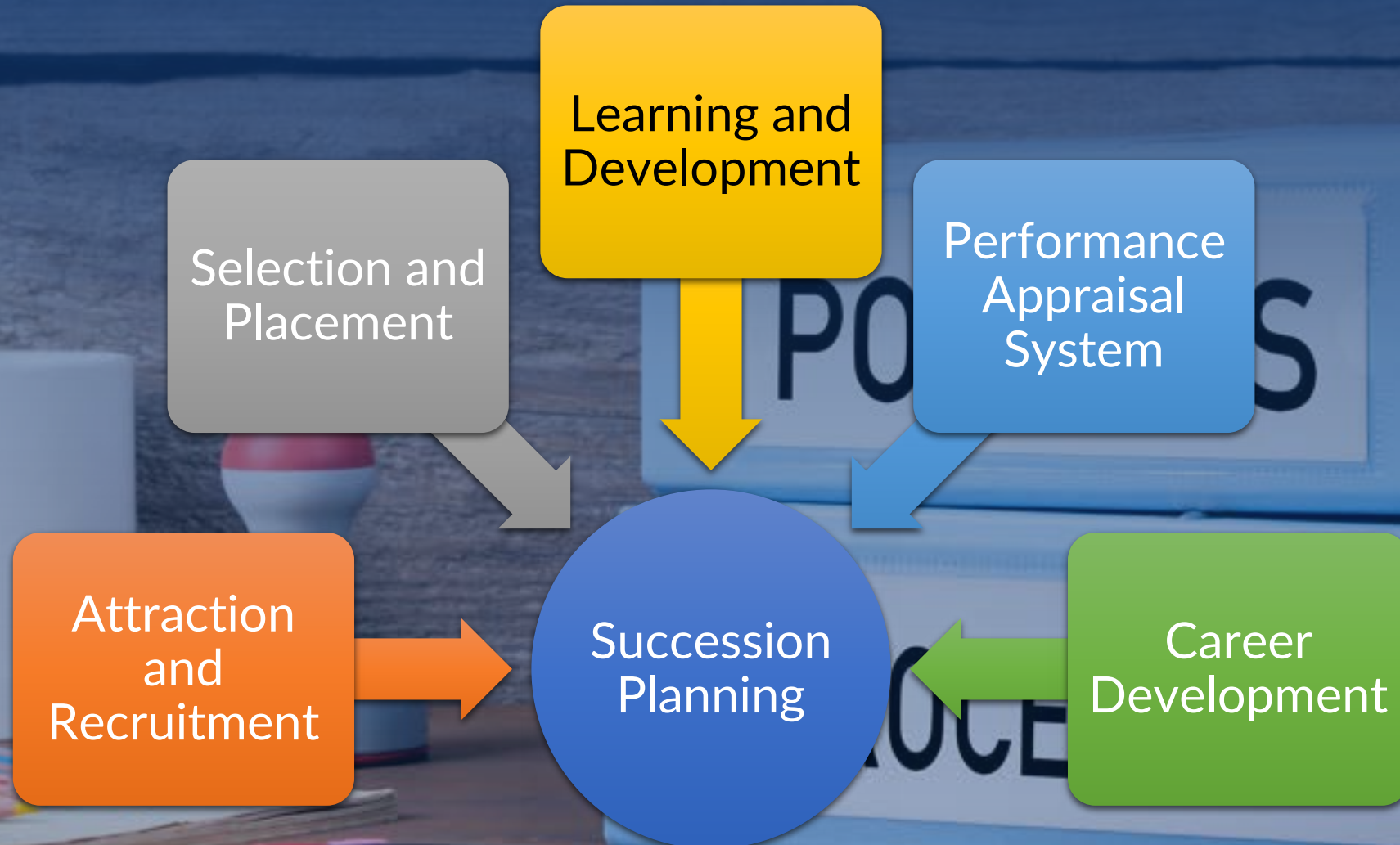
# 2. DETERMINE CRITICAL POSITIONS

## Identify At-Risk/Critical positions

1. Single Incumbent
2. Critical Task
3. Specialized Knowledge and Expertise
4. Difficult to replace from inside or outside of the organization
5. Difficult to Retain
6. Risk of Attrition
7. Retirement Vulnerable

# 3. ASSESS CURRENT PRACTICES & POLICIES

## 4. CONDUCT GAP ANALYSIS



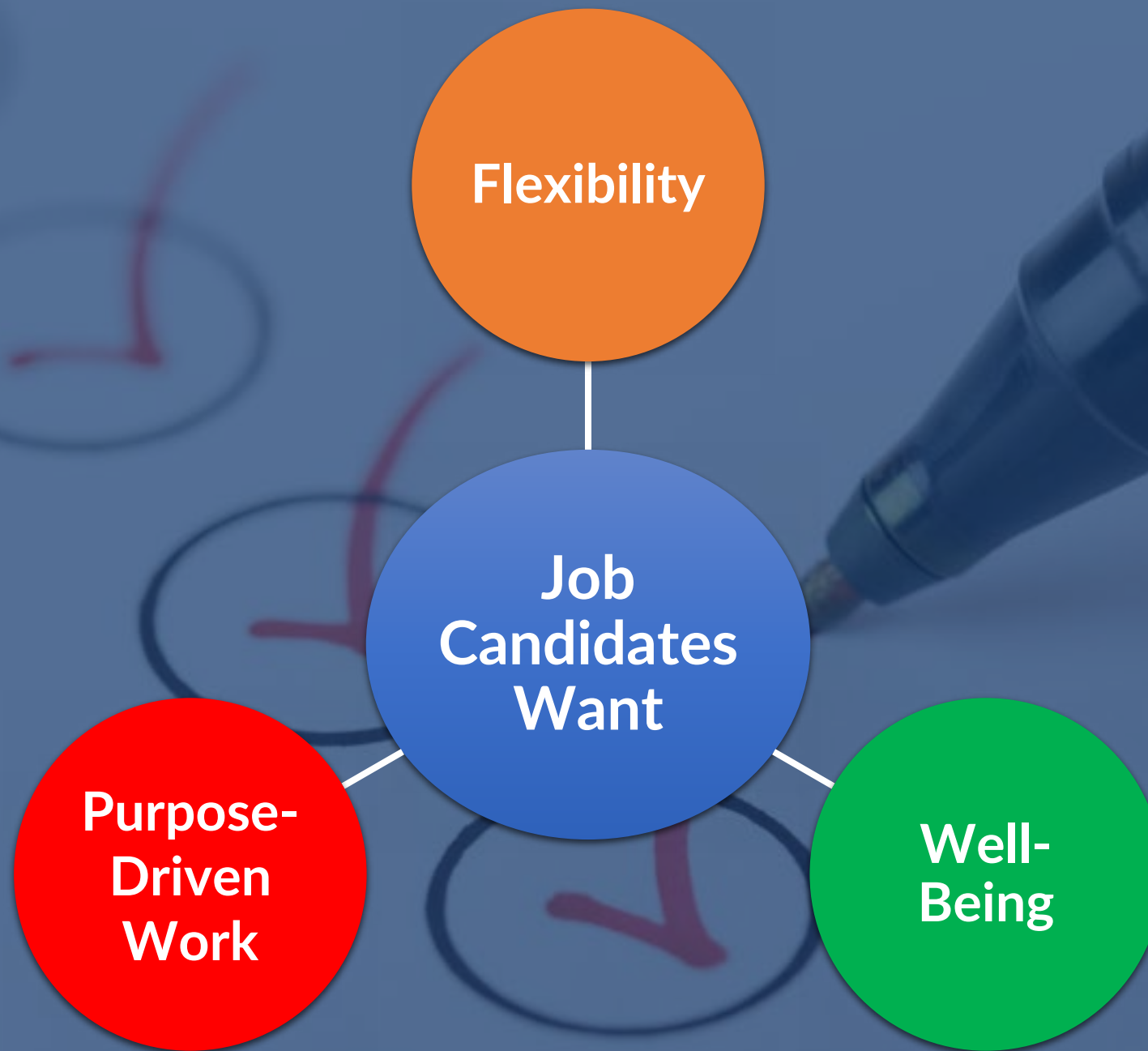


## 5. MODERNIZE YOUR APPROACH

*The intent is to bring in new employees who are as good as your current top performers. The marketplace for talent is competitive, so the best recruiting efforts are proactive, dynamic, and capable of engaging candidates.*

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





# What's your *Employer Value Proposition?*



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



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. How strong is our brand as a magnet to attract top talent?





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

“Hire for Potential,  
not Experience.”



# YESTERDAY'S JOB ANNOUNCEMENT



This is an open recruitment for a Water/Wastewater Treatment Plant Operator II who meets the minimum qualifications, standards and filing requirements specified on this announcement. The Water District, Operations Department, Wastewater Treatment Division currently has one permanent opening available, and is offering a career opportunity for an individual interested in becoming a member of a wastewater treatment facility team.

The Water/Wastewater Treatment Plant Operator II is an experienced working level position that monitors, operates and adjusts water/wastewater treatment plant equipment on an assigned shift, performs standard chemicals tests, maintains operating records, and performs routine equipment maintenance, plant and facility inspection. Incumbents may be required to work extended hours, holidays and weekends, and in all manner of inclement weather.



## WHO WE ARE

Working for the Town of Queen Creek is an incredible opportunity to shape the future of a unique community. Our young, thriving community of approximately 61,724 residents is lovingly nicknamed "the QC," and is a special place for both families and businesses to call home.



PHOENIX BUSINESS JOURNAL



2018 BEST PLACES TO WORK

**#11 Town of Queen Creek**

Midsize Company



## FAMILY ORIENTED

The Town of Queen Creek has grown from its rich, rural roots into one of the most innovatively planned and family-friendly communities. Those same values have manifested within our organization, with employee benefits such as a four-day work week, paid volunteer leave and regular team-building events.





Adventurers  
Wanted!  
We help you realize your  
potential.



# RECRUITMENT IMPROVEMENTS

- 01 Hire Faster - Accelerate the application process – improve the candidate experience

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- 02 Create a Recruitment Plan for each vacancy

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- 03 Establish your own Farm System

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- 04 Create a Time-to-Hire metric



# RECRUITMENT IMPROVEMENTS



- 05 Canvas list of seasonal employees for potential future candidates applying for full-time positions.

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- 06 New name for job openings – [www.agencynamejobs.com](http://www.agencynamejobs.com)

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- 07 Testimonials from current employees

# SAMPLE INTERVIEW QUESTIONS



01 What did you learn last year?

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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 are the biggest challenges facing our organization?

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

# 6. EVALUATE INTERNAL CANDID

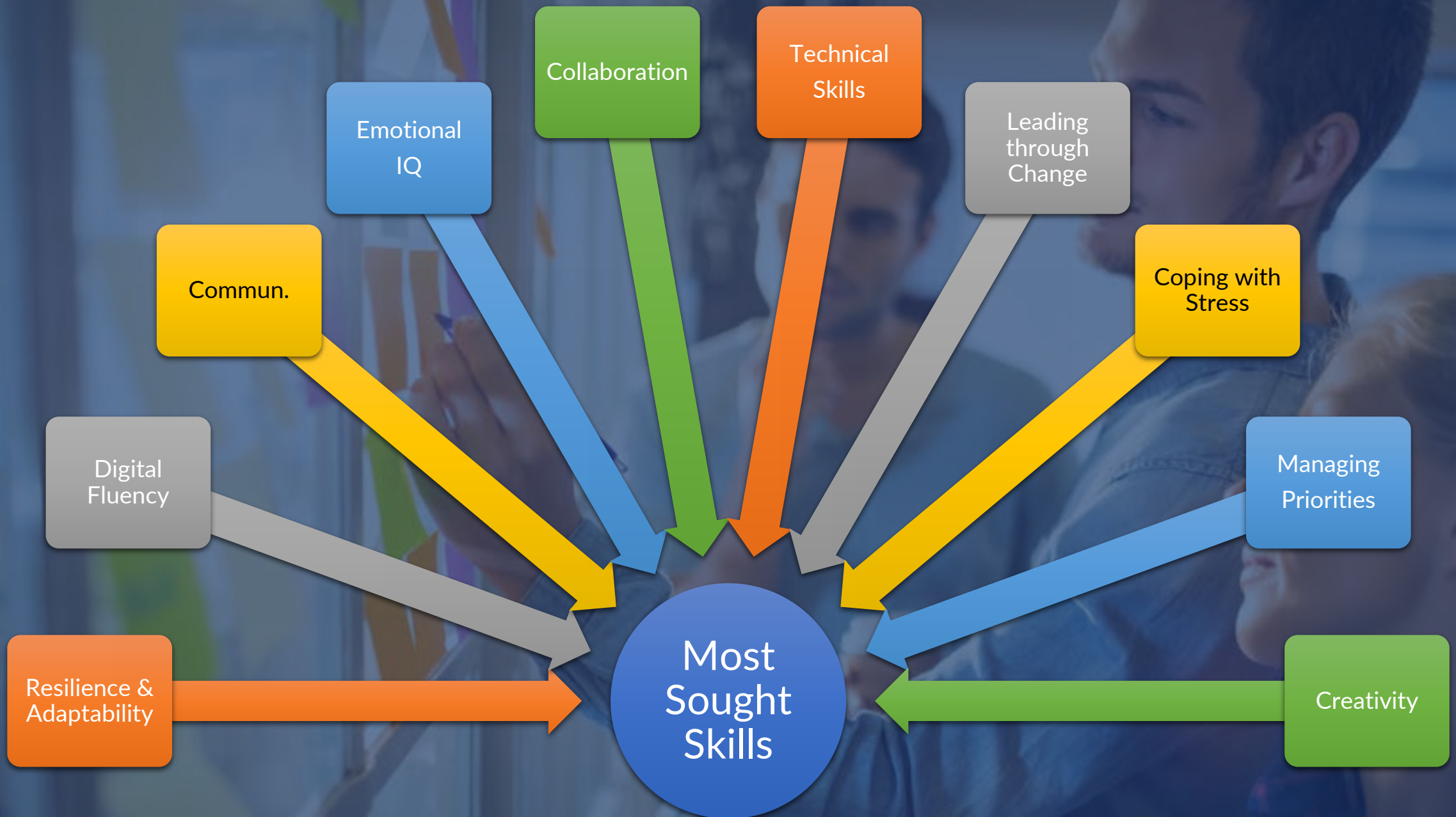




“Let’s not  
train employees,  
they might leave.”  
What if you don’t, and  
they stay?

# 7. REVISE LEARNING & DEVELOPMENT PROGRAM

Developing your employees' skills at a rate equivalent to the rate of change 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.



# 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
  - Leadership and Management Skills Training
- *How do you contact us?* Patrick Ibarra, 925-518-0187 or [patrick@gettingbetterallthetime.com](mailto:patrick@gettingbetterallthetime.com)
- *Web address:* [www.gettingbetterallthetime.com](http://www.gettingbetterallthetime.com)

