

# Succession Planning

1

**ERIC MILSTEAD**

**IDAHO LEGISLATIVE SERVICES OFFICE**

9/29/2015

# Succession Planning

## Long Term/Short Term

2

- Two Approaches:
  - Long term—where the incumbent is able to strategically plan for succession, i.e., train and promote staff, etc.
  - Short term—where succession is imminent

# Long term succession planning

3

- Long-term succession planning
  - Analyze the agency's current workforce strengths
  - Assign the appropriate staff responsibilities
  - Identify the most obvious candidates in the agency
    - ✦ Focus on these individuals; provide opportunities; provide training;
  - Staffing divisions
  - Leadership training
  - Promotions
  - Putting people in positions to succeed

# Succession Planning

## Short Term

4

- Short term succession planning
  - When the incumbent's retirement is imminent
  - When the successor has been selected
  - When the successor is from within the agency

# Short Term Succession Orientation

5

- Approaches to short term succession orientation
  - Informal—attributes and shortcomings
    - ✦ Easy
    - ✦ Less time consuming
    - ✦ May not provide sufficient detail
  - Formal—attributes and shortcomings
    - ✦ May be more helpful
    - ✦ Demands more time and planning
    - ✦ Adds tasks during transition period

# Short Term Succession—Informal Approach

6

- Informal discussions
  - How to deal with anticipated daily demands—what are they?
  - Discuss current hot button issues for leadership
  - Staff issues
  - Discuss personalities of key members
- Sharing of relevant information
  - Emails
  - Other correspondence
  - Get a sense of information in filing systems—electronic and paper

# Short Term Succession—Informal Approach

7

- Informal discussions
  - Deal with anticipated daily demands
  
- Who and what are the key resources for specific situations?
  - Legal issues
  - Public records requests
  - Senate/House relationship issues

# Short Term Succession—More Formal Approach

8

- Participation in meetings with agency staff
  - Staff meetings
    - ✦ Agency-wide
    - ✦ Division only
    - ✦ Division managers' meetings



# Short Term Succession—More Formal Approach

9

- Introductions with executive branch officials—governor’s office, board of education, department of administration, etc.
  - Discussions regarding upcoming issues, events, etc.
- Successor assumes the role in as many instances as possible

# Succession

10

- Some elements will be the same regardless of the approach
- Month-by-month planning document
  - Very high-level
  - Reflects essential tasks
  - Month-by-month approach

# Succession

11

- Caveat regarding a more formal approach—these are thoughts after less than one year on the job.

# THANK YOU

12

## Questions?