



# 10 Steps to Succession Planning

Succession planning has gotten even more challenging in recent years, given a changing job market, shorter employee tenure, and COVID-19 job turnover—which means that governments should make it an even higher priority. GFOA's 10 steps to succession planning will help your organization retain key talent and find skilled employees to replace staff members who move on.

- 1 Develop an integrated approach.** Organizations that don't rely on a "just-in-time" approach have higher retention rates, better employee morale, and an environment that stimulates innovation and organizational change.
- 2 Continually assess potential employee turnover.** Making career planning discussions a part of a regular and ongoing performance review process helps in assessing potential turnover.
- 3 Provide a formal, written succession plan as a framework.** Without a formal plan, workforce and succession planning tends to be haphazard.
- 4 Develop written policies and procedures to encourage knowledge transfer.** Have written procedures that formalize the knowledge transfer, including a meeting with departing staff to document job responsibilities.
- 5 Develop leadership skills as a key component.** The organization benefits from developing a leadership pool for other positions.
- 6 Encourage personal professional development activities.** The organization will benefit over the long term by helping employees gain the skills they need to assume increased responsibilities.
- 7 Design better recruitment and retention practices.** Don't focus more on recruiting new employees than on orienting and developing existing employees. For example, pay should be competitive with the marketplace.
- 8 Work out how collective bargaining agreements fit in with the overall succession plan.** Engage bargaining units for cross-training opportunities.
- 9 Consider non-traditional hiring strategies.** Options such as part-time work, job-sharing, volunteers, and flexible schedules and flexible-place arrangements help meet the needs of the organization and employees.
- 10 Be prepared by addressing the succession planning risks associated with essential positions.** The COVID-19 pandemic has demonstrated that many finance positions in local government are essential. All organizations need to be prepared with succession plans for all positions, especially those serving critical functions, as a business continuity strategy.