

# Seamless Transitions: Effective Succession Planning for the Public Sector



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EMPOWER YOUR PURPOSE

# Meet the Presenters



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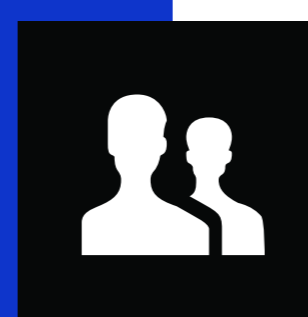
*Connect with us on LinkedIn to continue the conversation!*

# Agenda

In an era of rapid change and increasing demands on public services, evolving workplace needs and increases in retirements and departures, it is crucial to ensure seamless transitions of knowledge skills and leadership. This engaging webinar will explore the unique challenges and opportunities associated with succession planning in the public sector including actionable strategies and a practical approaches and best practices necessary to set up your organization for smooth transitions.



**What is the current state of succession planning?**



**Defining succession planning and benefits**



**A simplistic approach to succession planning**



**What you can do today to get the process started**



## **Poll #1**

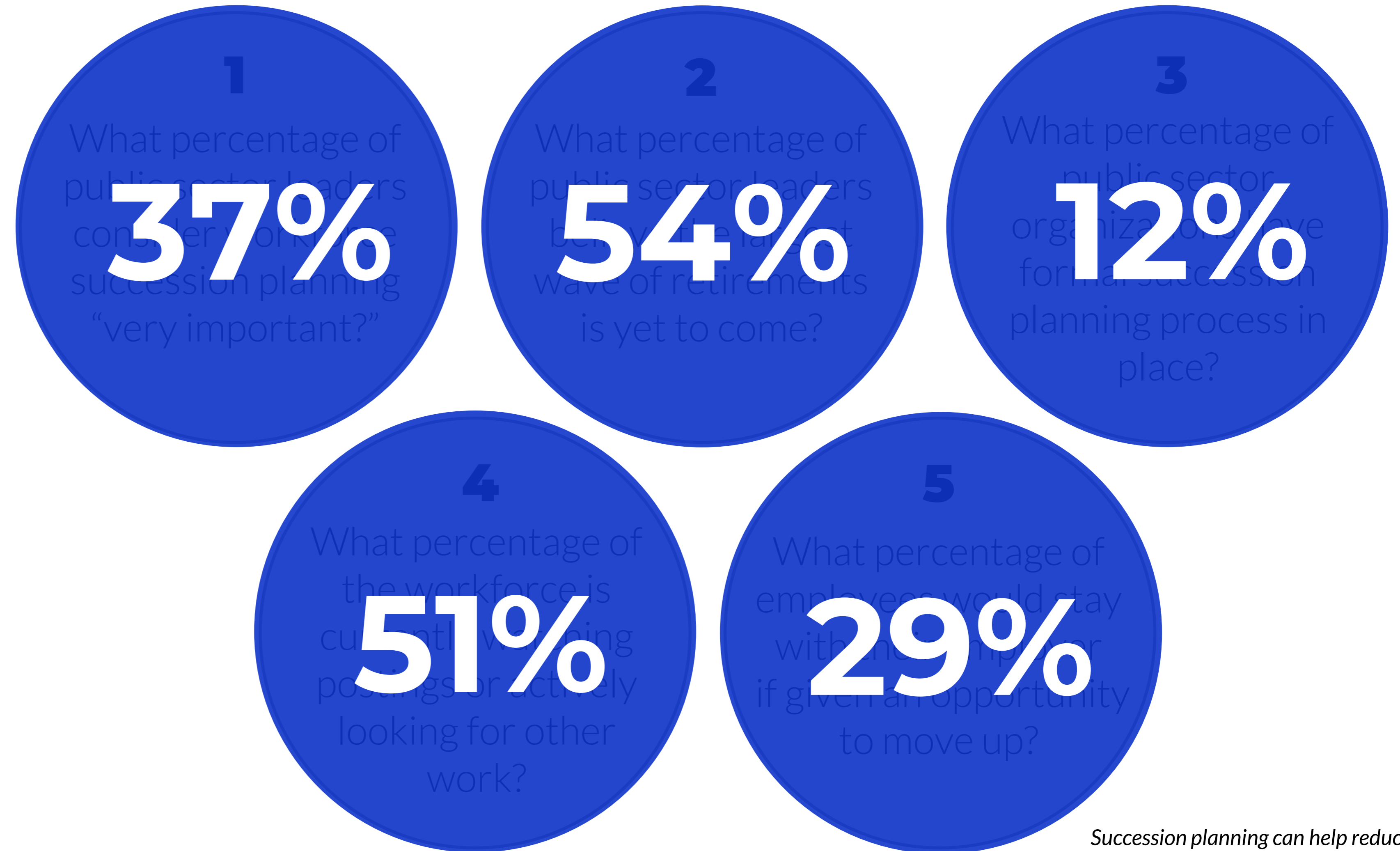
**Do you currently have a succession plan in place for your organization?**



## Poll #2

**What is your biggest challenge with  
succession planning?**

# Succession Planning by the Numbers 6



*Succession planning can help reduce turnover and increase engagement*



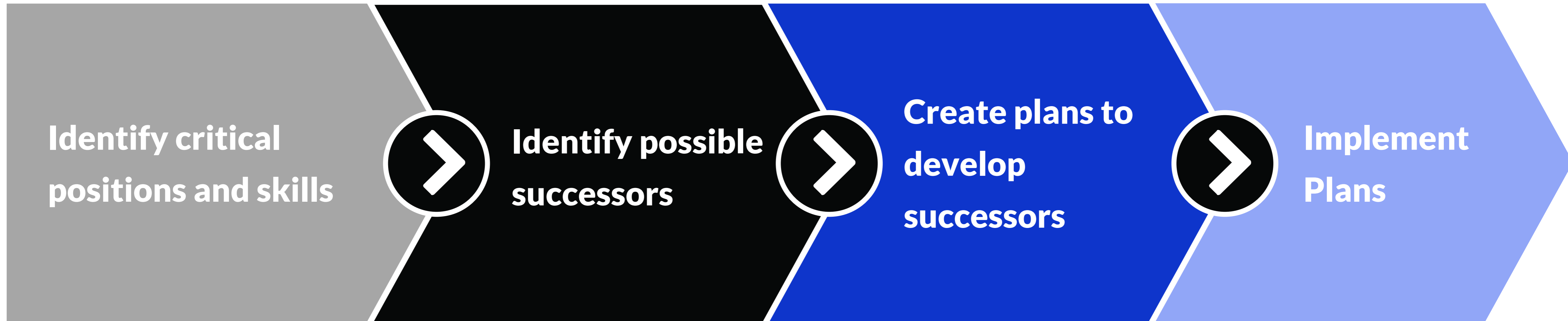
# SUCCESSION PLANNING DEFINED

# What is Succession Planning?

**The process of identifying and preparing employees to fill key roles in an organization when someone leaves**



# Succession Planning in Four Steps



# Let's Learn and Practice Together

We will walk through the steps of the succession planning process

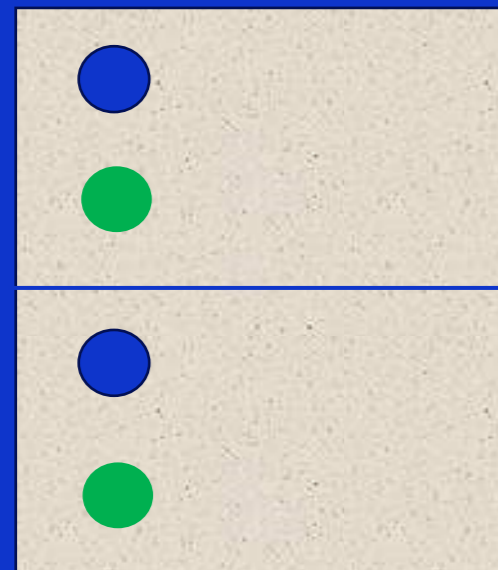
Take out a piece of paper or notebook

Draw a line down the middle horizontally

**1****Let's Analyze Your Situation****Are You Prepared?**

# Practice

## Identify Critical Roles



*Use your paper or notepad.*

*List critical role(s) on the top half, retirement(s) on the bottom half*

## Critical Role

Identify someone, who if they walked out the door tomorrow, would be devastating

## Upcoming Retirement

Identify someone who you either know or believe will be retiring soon.

A group of six diverse people (three men and three women) are standing in a row against a chalkboard background. They are holding various shapes of speech bubbles: a man on the left holds a white speech bubble, a woman holds a blue rounded rectangle, a man holds a white circle, a man holds a blue circle, a woman holds a white speech bubble, and a woman on the right holds a white rounded rectangle. A large blue semi-transparent banner is overlaid across the middle of the image, containing white text.

## Poll #3

**What are signs someone is at risk of leaving? Mark all that apply.**

# Did you get them all?

## Signs someone is at risk of turnover

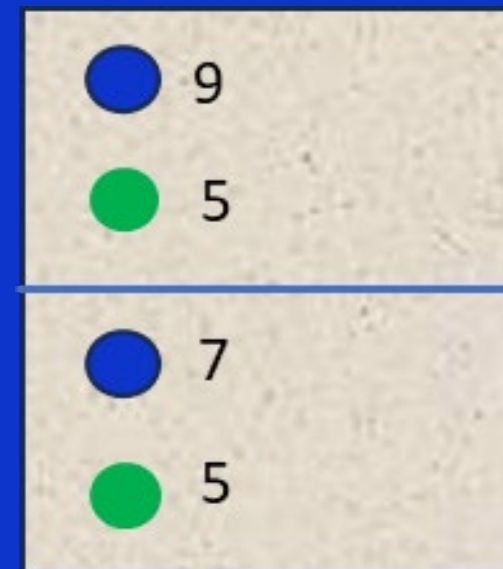
- Changes in attitude
- Late to work/early to leave
- More absenteeism
- Taking more vacation days than normal
- Productivity changes/drops
- Avoiding work social events
- Reluctance to commit to long term projects
- Taking more personal calls
- Unrealistic requests (promotion, pay raise)
- More active on LinkedIn

## Signs someone is looking to retire

- Subtle changes in behavior
- Change in attitude toward work
- Increased focus on personal life
- Discussing/focus on retirement plans
- Expressing frustration with tasks
- Feeling burnt out
- Taking more time off
- Discussing future travel plans
- Less concerned with career development

# Practice

## Turnover Risk Factors



*Use your paper or notepad.*

*List how many factors are applicable*

Considering the list of turnover risk behaviors for both critical role and retirements, how many do you see in each of your individuals



**If they unexpectedly left tomorrow, how would this impact your organization?**

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**Consider the following:  
What would be the impact to your organization if they left today? Which of these impacts would you experience?**

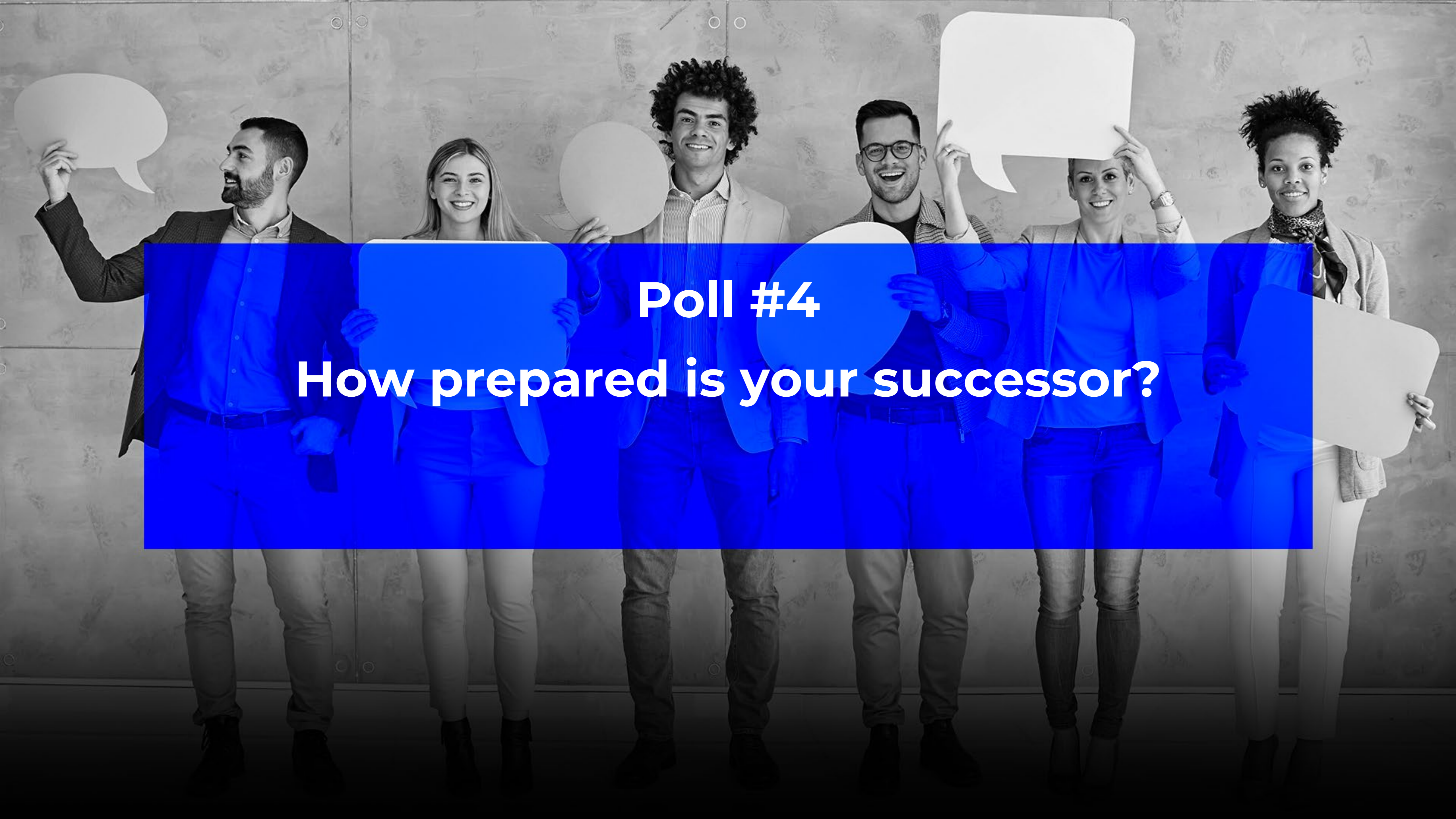
- Loss of critical or specialized knowledge or skill
- Disruption to day-to-day operations or processes
- Relationships with constituents, providers, or others impacted
- Reduction in employee morale on team
- Disruption in deadlines, project or work progress
- Remaining employee stress, increased workload, engagement

**Consider the following:  
How long would it take you to recover  
from a critical role departure?**

- Less than 1 year
- 1-2 Years
- 3-4 Years
- 5 or more years

**2**

**Have you thought about  
who might be able to take  
over critical roles?**



## **Poll #4**

**How prepared is your successor?**

# Practice

## Identify Successors

● 9 John
● 5 Julie
● 7 Beth
● 5 Bob

*Use your paper or notepad.*

*List who would be the best person to take over.*

Who is the best person in your organization to take over for the roles on your practice sheet?

Why did you choose that person?

# Pitfalls when selecting Successors

Avoid these pitfalls when using these criteria alone to identify successors

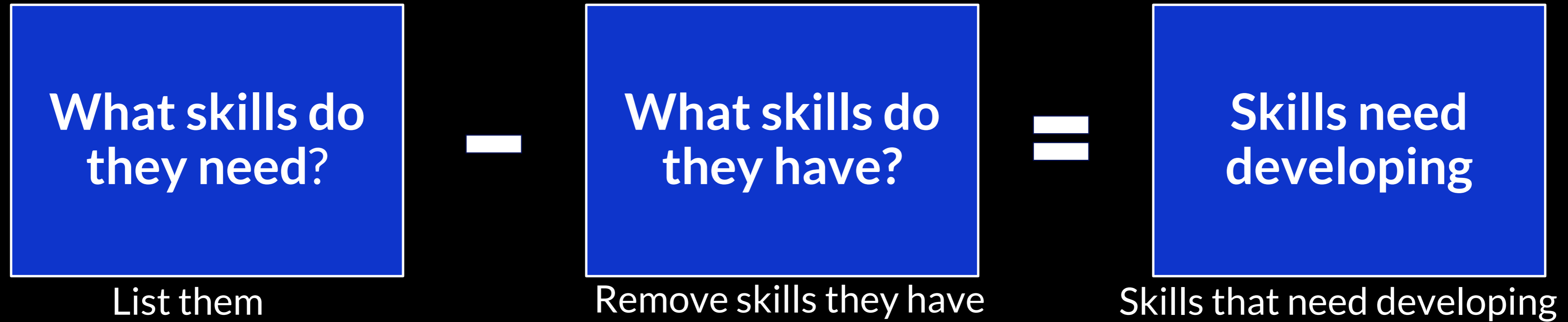
- Automatically choosing the “assistant”
- The individual who continually asks for a raise
- The highest paid individual
- The individual who has been longest in their job
- The individual who has been asking to be a manager

## When selecting successors

- A high performing individual – good work outcomes
- Someone who has shared interest in role or career development
- Willingness to learn
- Track record of success
- Enthusiastic about the organization or role (engaged)

# Potential Successor Ready? Analyze Skills

## The Formula



### Analyzing Skills: How do you know?

- Analysis of performance metrics
- Demonstration of the skills on the job
- Manager assessment/feedback
- Discussions or interviews
- Training matrixes or development plan completions
- They tell you they know



# Practice

## Analyze Skills of Successors

● 9 John Skills
● 5 Julie Skills
● 7 Beth Skills
● 5 Bob Skills

*Use your paper or notepad.*

- Make a list of the skills your successor needs
- Mark off the ones they have
- The remaining skills are the development plan

**3**

# **Developing Successors**

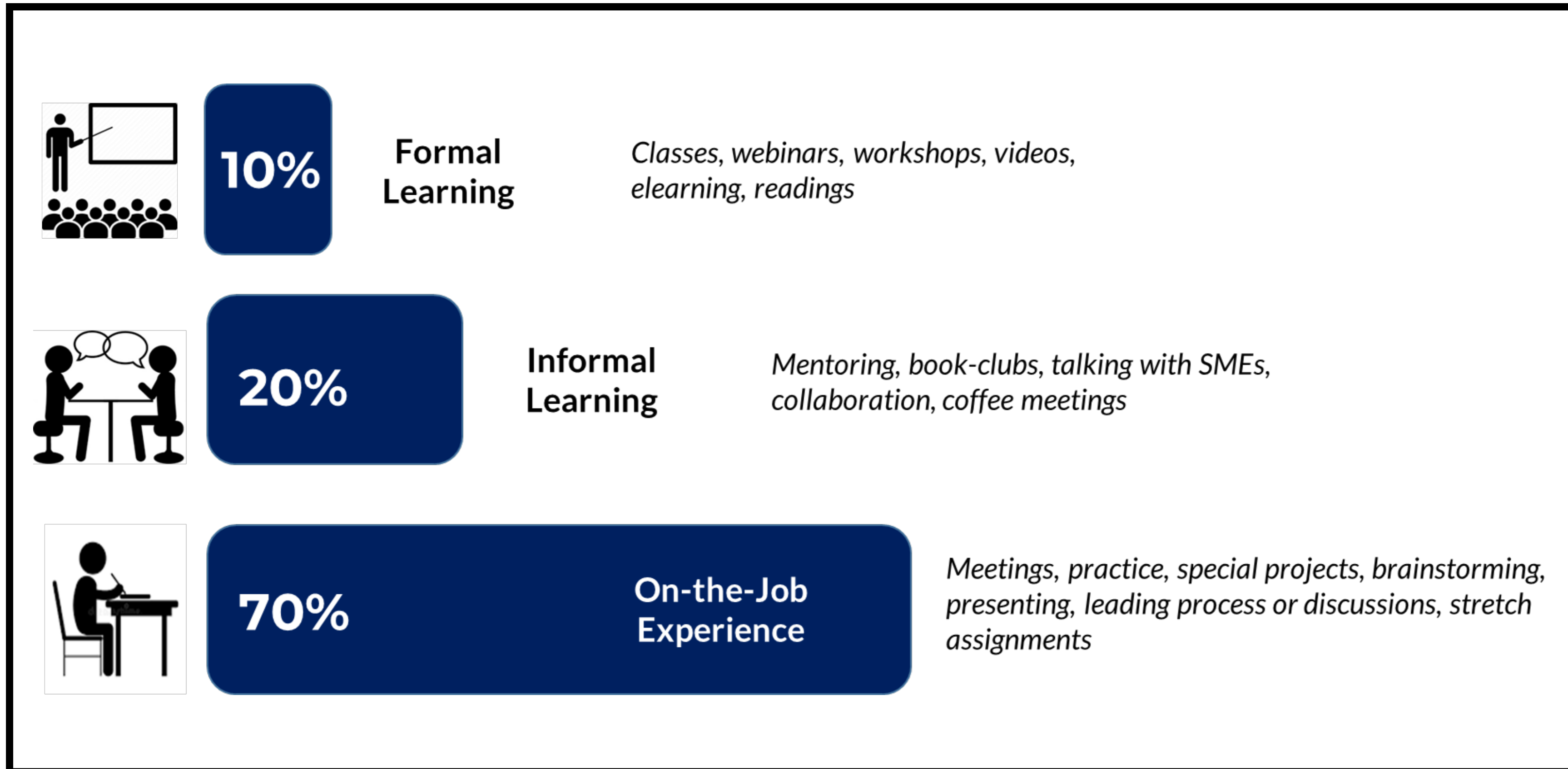
## **Close the Gap**



## **Poll #5**

**What are the best ways to develop successors?**

# How Skills are Mostly Learned



- Development happens mostly on the job through work experiences
- Use internal resources and people for the best outcomes and results
- Combine methods to ensure mastery

# Capturing Organizational Knowledge

Method	What it is	Elements
<b>Mentoring</b>	Pair someone with knowledge and history with knowledge seeker	<ul style="list-style-type: none"> <li>Individuals/mentor create a plan</li> <li>Meet regularly - 1:1 relationship</li> <li>Discuss content &amp; provides practice</li> <li>Mentor guides</li> </ul>
<b>Job Shadowing and/or Rotation</b>	Someone sits with incumbent, watches, learns and practices	<ul style="list-style-type: none"> <li>Create a plan for roles</li> <li>Rotate across many roles</li> <li>Groups may participate</li> <li>Provided practice opportunities</li> </ul>
<b>Lunch and Learn Sessions</b>	Individual shares knowledge in short presentation format	<ul style="list-style-type: none"> <li>Create a rotation/structure with agenda</li> <li>Regular schedule - rotate leaders/speakers</li> <li>Groups participate</li> <li>Provide hands-on supplemental</li> </ul>
<b>Internal Videos/Webinars</b>	Videos and/or webinars are recorded with process or procedures	<ul style="list-style-type: none"> <li>Identify key processes or knowledge</li> <li>Record/document process using videos</li> <li>Include multiple roles and processes</li> <li>Follow up with group discussion</li> </ul>

# Get Started Now – Your Checklist

- Get started early - don't wait for departures to happen
- Start with your practice notes
- Discuss your intentions and plans with managers – get them on board
- Start with one or two roles at a time, build from there
- Identify the most critical roles and/or skills (and/or train managers to do so)
- Can others perform those critical roles/skills? Don't know? Analyze skills
- If no, explore options for capturing and sharing the knowledge and create a plan
- Require career development discussions and plans for everyone
- Provide continuous development opportunities to meet all plan requirements
- Train your managers on these concepts

# 2025 Public Sector Webinar Series

## 2025 Governmental GAAP Update

Date: Jan. 22

Presenter: Dan Merritt

A deep dive into 2025 accounting pronouncements and other implementation guidance from the Governmental Accounting Standards Board (GASB).



## 2025 Nonprofit Update

Date: Jan. 23

Panel Presentation

A deep dive into 2025 accounting pronouncements and other implementation guidance from the Financial Accounting Standards Board (FASB).



## Seamless Transitions: Effective Succession Planning for the Public Sector

Date: April 30

Presenters: Kerreen Conley & Cheryl Kuch

An interactive session covering actionable strategies to set up your organization for smooth transitions during these critical times.



## 2025 Single Audit Update

Date: July 23

Presenter: Dan Merritt

Hear the latest updates on recent guidance provided by the Office of Management and Budget (OMB), the Government Accountability Office (GAO), the American Institute of CPAs (AICPA) and more.



## From Risk to Resilience: Key Strategies to Improve Your Organization's Internal Controls

Date: Oct. 8

Panel Presentation

This webinar will provide essential insights and best practices for public sector leaders and board members to safeguard their organizations.

Click [here](#) or visit [Rehmann.com](https://www.Rehmann.com) to register for our upcoming webinars

**Thank you for joining us!**

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**Questions?**

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