

Mature Age

Workforce Resource 2015



A framework of recommendations for the management and retention of mature talent in local government

FOCUS AREA 3.5

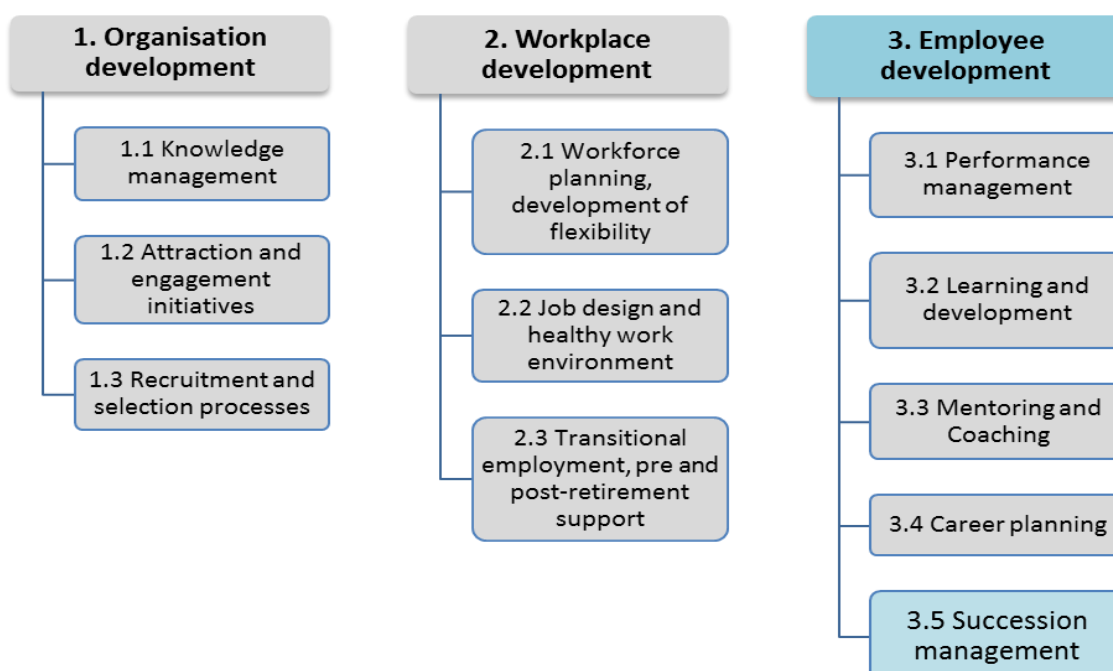
SUCCESSION MANAGEMENT

The Toolkit is designed to be used by the Human Resources or Organisation Development (HR/OD) and leadership teams as they enhance their organisation's culture.

Suggested actions and strategies to help the mature age workforce may apply to the broader workforce as well and could contribute to fairer and more equitable work conditions and opportunities for all staff. Each organisation will already have in place human resource management policies and activities. It is not the intention of this toolkit to conflict with existing policies or actions. Rather, it can add value to the operations of the organisation by being used as stand-alone or integrated actions and initiatives.

Development initiatives are presented in a very broad way, with a set of actions identified as recommendations. Templates are not used in the Toolkit so that HR/OD practitioners can interpret recommendations in the most appropriate way that is aligned to existing initiatives.

There are many intended linkages and connections between the Focus Areas, which is an important factor as an aligned HR/OD strategy is developed and applied. The intention of the Toolkit is that work will be adapted and modified within each council organisation. Recommendations are not in any way intended to be prescriptive.



This Focus Area 3.5 of **Succession Management** presents ideas and suggestions about how to develop the concept of succession management in the council organisation, as well as how the concept might be introduced and developed in the organisation.

1. OVERVIEW – the need for change

Succession management is presented as an aspect of personal and workforce planning, incorporating elements of risk management, career and leadership development and the enhancement of the workforce culture.

Succession management is defined as the identification and development of people to fill key positions by being 'job ready'. It is a tacit identification process that is not necessarily formalised by documentation beyond that used in the learning and development and career management processes. It addresses the need to identify and develop the flexible thinking of leaders as they manage key roles in the organisation. A number of enablers and tools that support sound succession management can be developed and described according to those already in place in the organisation.

This Focus Area supports the implementation of a range of succession planning and management activities that are designed to engage employees in the sharing of development processes, skills, information and access to professional relationships developed over the course of their employment.

Council organisations operate in a dynamic environment and must constantly adapt and re-focus their succession needs based on the understanding that succession planning will reflect the strategic needs of the organisation at any point in time. Therefore, approaches to succession management must be planned and targeted to retain the expertise, capability and skills of all key positions. The benefits of an effective succession management strategy include:

- Minimising the risk of departure of key roles and leaders;
- Enabling on-the-job skill transfer that is aligned to the business and workforce needs of the council organisation;
- Providing for regular update of the organisation's job roles and position requirements;
- Developing a suitably skilled pool of job-ready applicants who are available for positions as they become available;
- Improving career path options through transparent succession planning options;
- Developing a culture that supports the sharing of on-the-job skills and development opportunities.

It is the aim that these processes become an integral part of workplace practice in the future by creating a culture where employees are fully engaged in the process of sharing talent identification, capability development and on-the-job skill enhancement.

2. HOW WILL THIS FOCUS AREA HELP WITH CULTURAL CHANGE?

The risk of the loss of talented staff members in key positions is highly pertinent to the needs of the organisation to maintain high quality service delivery into the future. Therefore, to ensure

that critical skills are transferred as a matter of priority, the intention of this Focus Area is to provide guidance on how the organisation could address succession needs associated with:

- a) High risk, core, specialised operational roles;
- b) Identification of skill and knowledge shortage;
- c) Attention to work roles undertaken by mature age employees with the increased potential for early exit due to confirmed retirement or who are transiting to retirement.

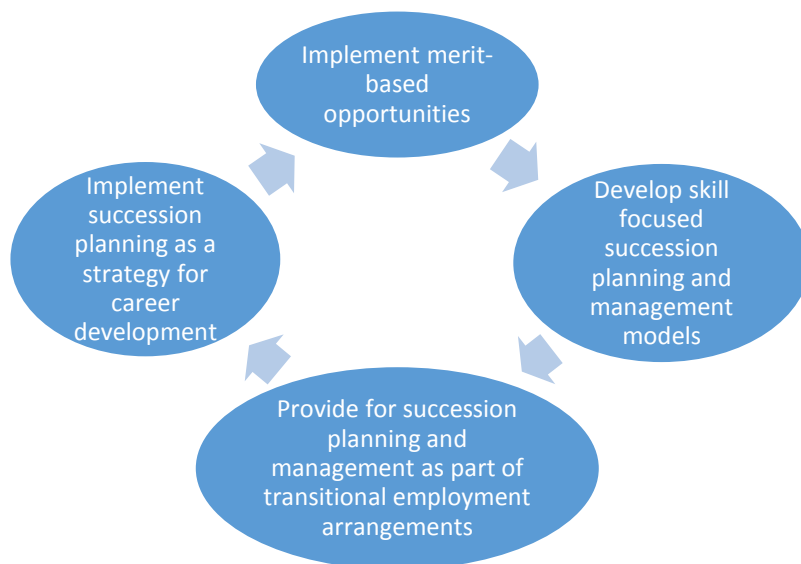
The application of this Focus Area targets operational aspects of the business and is not extended to broader knowledge requirements in the first instance. This Focus Area sets out the key strategies and actions for how the organisation can manage the identification of talented employees, critical role knowledge and on-the-job skills gained by mature age employees throughout the course of their employment. The focus is on succession management within the operational context of the organisation to ensure future business continuity and workforce capability.

This Focus Area has application to all council staff but in particular mature age employees transitioning to retirement.

3. DEFINITIONS

Succession management	The way in which the Succession Plan is implemented. It may link with career development initiatives, leadership development, learning plans and performance management strategies
Succession planning	The process of identifying and planning for the need to transferring knowledge, information, skills and insight from one job incumbent to another employee who has been identified as having the potential and development commitment to be ‘job ready’ at some time in the future

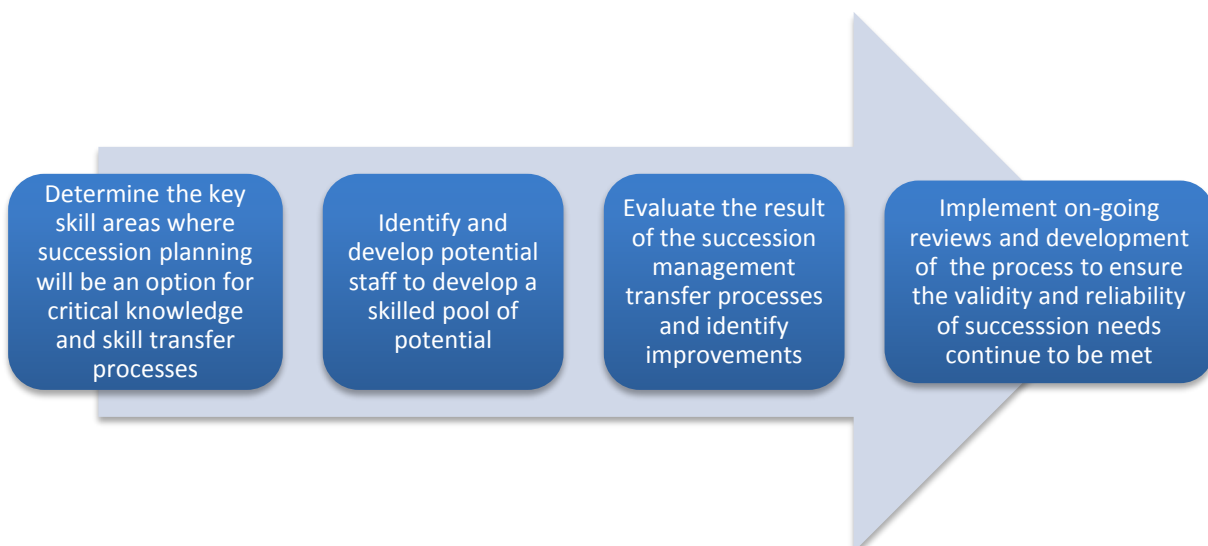
4. ACTIONS to address in this Focus Area include:



<p>Develop skill focused succession planning and management models</p>	<ul style="list-style-type: none"> ▪ Implement formal succession planning processes that engage senior management in reviewing future skill requirements against strategic planning documents ▪ Include succession planning as part of workforce planning analysis and recommendations ▪ Develop a register for succession planning priorities that are linked to critical skill and workforce capability needs as opposed to current job requirements ▪ Use succession planning as a leadership development tool
<p>Provide for succession planning and management as part of transitional employment arrangements</p>	<ul style="list-style-type: none"> ▪ Identify critical knowledge and skills where succession planning creates the most effective means of transferring content and skills from one person to another ▪ Where appropriate, use succession planning as a means of strengthening relationships across generational age groups
<p>Implement succession planning as a strategy for career development</p>	<ul style="list-style-type: none"> ▪ Identify interest by mature age workers in succession planning as part of career planning and development ▪ Confirm the nature of the succession planning opportunity, duration intended and expected skill development outcomes
<p>Implement merit-based opportunities</p>	<ul style="list-style-type: none"> ▪ Succession planning opportunities ought to be determined on a merit-based selection process

4.1 Encouraging succession management

The following details outline a method for implementing succession management activities in the organisation.



5. WHO CAN CONTRIBUTE TO CHANGING THE CULTURE?

The model adopted by the organisation for succession management ought to be based on a shared responsibility for ensuring identification of key roles, development of desired leadership qualities and required key knowledge and skills to support business objectives. Workforce capability should be managed in the interest of the organisation and the collective benefits to all employees.

Managers

- Identify and implement opportunities for succession planning in accordance with skill needs identified in the workforce plan;
- Contribute to a positive culture that supports and encourages identification of talent and the significant, specialised roles as part of daily workplace practice;
- Ensure staff members are aware of the current and future strategic priorities of the organisation and how these influence the succession planning priorities;
- Identify critical job roles, work areas and employees for participation in formal succession management processes;
- Implement effective engagement processes that enable staff to directly contribute to identifying the ways in which succession is managed;
- Ensure that there is good integration of succession management practice with performance management systems and processes;
- Where appropriate, maintain records of actions taken as part of a continuous improvement model;
- Regularly review the future skill needs to ensure on-going validity and currency of succession needs against the changing strategic priorities of council.

Employees

- Contribute to a positive culture of succession management through development and support of colleagues and sharing relevant information as part of normal workplace practice;
- Contribute to the identification of specialist areas and analysis of needs related to job role and work area activities as requested;
- Identify interest in succession planning opportunities as part of career path and development plan;
- Contribute to identifying strategies for managing succession as related to individual positions and roles;
- Participate in developing succession management strategies that support the transfer and development of required skills and capabilities to others within the council organisation;
- Provide on-going input into review processes designed to improve work processes and succession management.