SUCCESSION PLANNING: DEVELOPING TOMORROW’S MUNICIPAL LEADERS

OMSAA Leadership Symposium

Sarah Hamulecki, Coordinator of HR, Oxford County

May 15, 2019
WHO AM I AND WHERE ARE WE?

- Sarah Hamulecki, Coordinator of Human Resources
- Oxford County is located in Southwestern Ontario
- Population: 111,000
- 800 employees
BACKGROUND

- Strategic plan developed in 2012
- One directive focused on Oxford County employees
- Initiatives included:
  - Employee Engagement survey
  - Competency Framework
  - Our People, Our Strength Plan
  - Learning & Development calendar
  - Succession Planning and Leadership Development
SUCCESSION PLANNING & LEADERSHIP DEVELOPMENT

- Created Leadership competencies
- Developed a Succession Planning & Leadership Development Toolkit (2015)
  - Succession Planning Tool
  - Leadership Development Resources
    - Leadership Development Action Plan
    - 360 Assessments
    - Future Ready Leadership program

- Not a policy
**SUCCESSION PLANNING TOOL**

- **1 page document**
- **Directors to complete on an annual basis**

---

**Form A: Succession Planning Tool**

*Use this tool to assist in the identification of potential position vacancies, recruitment and staffing needs, and challenges in the near future.*

<table>
<thead>
<tr>
<th>Position (Job Title)</th>
<th>Current Incumbent</th>
<th>Expected Date of Vacancy</th>
<th>Key Competencies Required</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
LEADERSHIP DEVELOPMENT ACTION PLAN

- Commitment by employees and supervisors to support leadership competency development
- Optional
- Tied to the Performance Appraisal process
- Identified:
  - Goals/competencies to be developed
  - Contextual (on the job) learning
  - Relational learning
  - Formal training
360 ASSESSMENTS

- Off-the-shelf assessment (Psychometrics)
- All of EMT (Extended Management Team)
- Assessment and debrief with HR afterwards
- Employee encouraged to share with supervisor (not mandatory)
- For personal development; not tied to performance
FUTURE READY LEADERSHIP PROGRAM

- Mohawk College Enterprises
- Offered in-house to 20 participants (2 cohorts)
- Combination of existing and aspiring leaders
- 7 days; 1 day per month
- Content worked with our competencies
WHAT HAPPENED?

- Directors did not complete the Succession Planning Tool (or did but didn’t share it)
- Wave of Action Plans completed at first, then dwindled & no follow up
- 360 assessments completed successfully & with positive feedback
- Ran 2 FRL cohorts successfully & with positive feedback
- Paused for a Learning & Development review (Deloitte)
CURRENT REFRESH

- Committed to revamping our Succession Planning program
- Explored different options (for leadership development too)
- Narrowed down to 2 options:
  - More formal succession planning with a pool of identified top talent
  - Modified version of our current program
CURRENT REFRESH

- **Moving forward with the modified version**
  - Did not want it to become a make-work project
  - Decision was partially impacted by the regional review

- **What will it look like?**
  - Annual review of potential future vacancies & OMERS data with HR
  - New Leadership Development program (Enliven HR)
  - Selection of aspiring leaders based on projected future vacancies
  - Employees encouraged to continue to discuss development plans through their PA
SUMMARY & LESSONS LEARNED

• Consider best practices but keep things simple and realistic for your organization

• Overall development philosophy = prepare people to be the best candidate for vacancies, but no guarantees

• Leadership development doesn’t “fix” people
Succession Planning
Developing Tomorrow’s Municipal Leaders
Thunder Bay, ON
May 15, 2019
Leadership Succession Planning
Unlike other businesses, if local government closes down, our world would not be the same...
Succession Planning

Just Imagine?
No Water...
No Paramedics...
No Garbage Collection...
No Sewers...
No Streets, Signals, Stop Signs...
No Public Recreation Facilities...
No Social Workers
No Planning...
No One to Put Out Fires...
No One to Catch the Bad Guys...
Everything would just go down the toilet!
### Municipal Sector

- **444 Ontario municipalities**

<table>
<thead>
<tr>
<th>Tiers</th>
<th>Population</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>173 Single Tier</td>
<td>&lt; 1,000</td>
<td>80</td>
</tr>
<tr>
<td>32 cities</td>
<td>1,000 – 10,000</td>
<td>191</td>
</tr>
<tr>
<td>23 municipalities</td>
<td>10,000 – 25,000</td>
<td>80</td>
</tr>
<tr>
<td>28 towns</td>
<td>25,000 – 50,000</td>
<td>28</td>
</tr>
<tr>
<td>85 townships</td>
<td>50,000 – 100,000</td>
<td>31</td>
</tr>
<tr>
<td>5 villages</td>
<td>100,000+</td>
<td>34</td>
</tr>
<tr>
<td>30 Upper Tier</td>
<td></td>
<td></td>
</tr>
<tr>
<td>241 Lower Tier</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Municipal Sector is Big Business

• Municipalities are responsible for:
  – $41.0B in annual spending
  – 270,000+ employees
  – 26 different services provided [airports to zoos]
  – Municipalities own & maintain 67% of all capital assets in Ontario (Feds 10%, Province 22%)
  – Municipalities receive only 9¢ of every tax dollar collected in Canada (Feds 47¢, Ontario 44¢)
Careers in the Municipal Sector
Local Government

• Positions available at all levels in municipalities
• $50K - $250K salary range
• Excellent benefits & OMERS pension plan
• Great mobility & flexibility
• Career advancement
• Mentoring by experienced professionals
Raising Public Awareness

- Better knowledge of local government by public is essential
- Enhanced awareness of local government by academia is critical
- Promote municipal career opportunities
- Quality programs & services
- Public confidence is improved
Tecumseh App

- Introduced August 2016
- First of its kind for a Canadian municipality
- Subscribers receive choice of info updates
- Various channels available for custom messaging
- [www.tecumsehapp.ca](http://www.tecumsehapp.ca)
According to Wikipedia:

- “Succession planning is a process for identifying and developing new leaders who can replace old leaders when they leave, retire or pass on.”
Succession Planning

- We must be prepared
- Need to develop the next generation of municipal leaders
- Councils must support resource development
- As community leaders...it is our duty
Need for Succession Planning

- *If we fail to plan...we plan to fail*
- Preparing for challenges & opportunities
Succession Planning
ONWARD’s Academia Network
Technology
Municipal Staff Eligible to Retire by Region

Succession Planning

<table>
<thead>
<tr>
<th>Region</th>
<th>Eligible to Retire</th>
<th>Unreduced pension (Now)</th>
<th>Reduced pension (Now)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GTA</td>
<td>21,143</td>
<td>9,089</td>
<td>20,501</td>
</tr>
<tr>
<td>West</td>
<td>42%</td>
<td>3,278</td>
<td>8,757</td>
</tr>
<tr>
<td>East</td>
<td>43%</td>
<td>9,722</td>
<td>2,773</td>
</tr>
<tr>
<td>South</td>
<td>44%</td>
<td>2,086</td>
<td>6,524</td>
</tr>
<tr>
<td>North</td>
<td>44%</td>
<td>6,978</td>
<td>5,069</td>
</tr>
</tbody>
</table>
Succession Planning
Time to planned retirement

- **21%**
  - Of CAO members will be retired within 2 years

- **51%**
  - Of all members will retire within 5 years

- **46%**
  - Of CAO members will retired within 5 years

- **10%**
  - Of our members will retire in less than 2 years

Length of Time
Working in the Municipal Sector

- **39%**
  - Have been in the sector for 21-34 years

- **29%**
  - Have been in the sector for 11-20 years

- **16%**
  - Have been in the sector for 6-10 years

- **11%**
  - Have been in the sector less than 5 years
Multi-generational Workforce...

- What are the different generations in the workplace?
- Each group has its own distinct characteristics, values & attitudes toward work, based on its generation's life experiences
  - Traditionalists...1925-1946
  - Baby Boomers...1947-1964
  - Generation X...1965-1980
  - Millennials or Generation Y...after 1980

By 2025

75% Millennials

Succession Planning
Leaders Embrace Younger Generations

• Help them grow
• Embrace diversity
• Work toward a greater purpose
• Prepare them for Industry 4.0
• Extend freedom, flexibility & responsibility
• Provide mentoring & coaching opportunities
Strategies for Cross-Generational Leadership

1. Re-energize your compensation & benefits
2. Expand your communication strategies
3. Make mentoring a constant
Changing Dynamics of Workforce

- Recruitment
  - Professional
  - Technical
  - Support
- Attracting, developing & retaining staff
- Poaching
- Compensation
- Work-life balance
- Wellness & EAP Programs
- Attracting the brightest & best
- Succession Planning value
5 Factors Common to High Performing Peer Groups

1. Having the right people in the room
2. Enjoying a safe haven
3. Fostering valuable interaction
4. Creating a culture of accountability
5. Having a servant leader

High-Performing Teams
Hard to create but worth the effort

Succession Planning
Recruitment in Tecumseh

• Director Public Works
• Chief Administrative Officer
• Chief Financial Officer
• Fire Chief
• Clerical & technical support
• Students
The Discipline of Success

• If you want to be successful, it seems to make sense to be around successful people
• The people we are surrounded by have an immeasurable impact on us
• *Who you surround yourself with matters!*
The Importance of a Mentor

• In addition to peers, it’s important to have a mentor
• Tap into the wisdom & experience of others
• Pay it forward to others when people need our help
Succession Planning
Contact

Tony Haddad
Chief Administrative Officer (retired)
Town of Tecumseh
Co-Chair ONWARD Initiative
519-990-5966
thaddad@mnsi.net