# **Succession Plan Options TEMPLATE**

OVERVIEW

Succession planning identifies strategies to develop employees within an organization to build capacity and capability. Succession planning also identifies sources of potential candidates outside of the organization. Effective succession management results in larger pools of qualified candidates available to apply on a competition.

The Succession Plan Options Template is intended to provide ideas and opportunities that can be used by ministries or organizations to successfully plan and prepare for the vacancy of a position. The template provides options that are currently used by ministries across the BC Public Service.

Ministries and organizations are not limited to the options in the template. The intention is to provide a selection of options which may be used to develop and implement a succession plan. Some options won’t fit every role and/or organization. The template is in Word so that it can be easily adapted to meet the needs of the user.

The Succession Plan Options Template was developed in collaboration with the Corporate Key Workstream Steering Committees and Working Groups.

THREE TYPES OF EXPERIENCES THAT IMPACT LEARNING & DEVELOPMENT

|  |  |
| --- | --- |
| **70%** | **EXPERIENTIAL LEARNING** |
| **20%** | **RELATIONAL LEARNING****(Coaching/Mentoring)** |
| **10%** | **FORMAL EDUCATION/TRAINING** |

# **SuCCESSION PLAN OPTIONS TEMPLATE**

This document contains experiences and options provided by ministries across the BC Public Service.

## POSITION TITLE

## POSITION INFORMATION

1. **The position:**
* **Is currently vacant**
* **Has no anticipated vacancy date**
* **Is anticipated to become vacant**\*If yes, when is it anticipated to become vacant? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
1. **What are the risks if the position becomes vacant or if the functions of the position are not performed? Describe the risks to the organization, including connections to the service plan, policy, and/or legislative requirements.**

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| --- |
| **Describe the context of position functions here.** **Linkages to legislation, regulations, and key ministry documents include:****Ministry Service Plan**The position is responsible for the [ADD RESPONSIBILITIES] documented within the Service Plan and Mandate Letter. **Leadership in the BC Public Service**Leadership occurs at all levels across the BC Public Service. Leaders foster organizational effectiveness and support the BC Public Service goal to successfully attract, retain, and develop employees. Leadership supports employee engagement, recruitment, retention, workload management, and ultimately, the services provided to the public. |

1. **Can this position be filled in its current form, or would it be challenging to identify successors for the position as it’s currently structured? Please select one of the options below and describe the risk mitigation strategies.**
* The position can be filled in its current form.
* The position's responsibilities will/would likely be changed to reduce succession, vacancy, and business risk.
* Other measures are being taken to reduce succession, vacancy, and business risk.

## Description of other measures being taken to reduce succession, vacancy, and business risk:

## IDENTIFICATION & RECRUITMENT OF SUCCESSORS

1. **Have individuals or groups of individuals been identified as potential successors?**Potential successor(s) refers to an individual or group of individuals who would be qualified to apply and capable of performing the role. If a role becomes vacant, the position would be filled through a meritorious hiring process.
* No identification has occurred
* Individuals have been identified as potential successors
* Groups of individuals have been identified as potential successors

## DEVELOPMENT

1. **Indicate which activities/actions you plan to use to develop potential successors.**

Select options that best suit the role and your organization. Please note that not all suggestions will be the right fit for every role. Identify and add other options in the document in the space provided.

|  |  |
| --- | --- |
| OPTIONS | EXPERIENTIAL LEARNING |
|  | **Open-Door Approach/Drop-In Sessions/Just-In-Time Learning*** Provide regular unscheduled opportunities for the employee to receive immediate on-the-job feedback/informal coaching. The employee can bring a piece of work to create dialogue and share experiences, discuss alternatives, and just-in-time learning.
* Provide immediate exposure to decision making, rationale behind decisions, share different perspectives, thought process applied to strategic decisions, and alignment to broader ministry, sector, and corporate government strategies.
* Create opportunities to share experiences, such as exposure to policy or legislation processes that will expand employee knowledge/understanding.
* Other:
 |
|  | Provide job shadowing opportunities to give employees exposure and experience in other roles at the same or higher level within the organization. |
|  | Provide connections where the employee can locate information or build relationships with others on similar subjects. |
|  | Provide opportunities to take on additional responsibility through stretch assignments in the employee’s current position. |
|  | Opportunity to act in the role, to cover vacation/absence; delegate more functions over time. |
|  | Opportunity to attend and/or present at Executive, Deputy Minister, and Minister briefings. |
|  | Provide opportunities to brief staff teams, senior leaders, and/or ministry executive to build skills and confidence briefing at the executive level and to receive immediate feedback on their presentation (both written and verbal). This could be a gradual process and could potentially start with building a presentation for executive with support and feedback.  |
| **OPTIONS**  | RELATIONAL LEARNING (COACHING/MENTORING) |
|  | **Formal Coaching** Participate in a formal coaching relationship with a professional coach or senior leader within or external to government to:* Provide career advice
* Identify areas for potential development
* Understand how personal goals align with corporate goals and vision
* Develop applicable strategic leadership competencies
* Build a professional network
 |
|  | **Formal Mentoring*** Consider ED’s or ADM’s for mentoring to develop executive presence, organizational awareness, and deeper understanding of organizational culture.
* Participate in ministry mentorship programs where available.
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|  | **Bilateral One-on-One*** Regular structured forum for the employee to ask questions/receive feedback.
* Provide coaching and advice regarding areas for development and next steps.
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|  | **Skip Level Meetings**Opportunity for a senior leader to have a conversation with an employee supervised by one of their direct reports. Skip level meetings provide the following advantages:* Opportunities for employees and leaders to get to know each other and build trust
* Build alignment and understanding of strategic and operational perspectives
* Identify areas for potential development
* Build professional network
* Develop applicable strategic leadership competencies
 |
|  | Encourage development of self-awareness through participation in psychometric assessments, such as Lumina Spark, Insights, MBTI, and tools, i.e., 360 Assessments. |
|  | **Self-Identified Learning*** The employee is provided with mentoring that’s spontaneous and based on the employee’s specific needs and interests at a point in time that will help develop their knowledge and competencies required for the position.
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| **OPTIONS**  | **FORMAL EDUCATION** |
|  | **Leadership** (e.g., BCPSA or ministry-specific leadership courses, recognized graduate degree, diploma, or certificate, etc.) |
|  | **Supervisory Skills** (e.g., BCPSA or ministry-specific supervisory courses, recognized graduate degree, diploma, or certificate, etc.) |
|  | **Technical/Financial Skills** (procurement, public sector accounting standards, etc.) |

## KNOWLEDGE CAPTURE & KNOWLEDGE TRANSFER

1. **Identify the** [**Knowledge Transfer**](https://www2.gov.bc.ca/gov/content?id=FC182DDF29B74E6F82FE16D0AABC85C0) **strategies or tools from the list below that you’re using or plan to use to support this Succession Plan. Describe them in more detail below.**
* Job Shadowing
* Formal Coaching
* Informal Coaching
* Communities of Practice
* Formal Mentoring
* Informal Mentoring
* Cross-Training
* Orientation of New Staff
* Overlap to Support Transition
* Peer Assisted Learning
* Expert Listing & Contacts
* Podcasts
* Blogs
* Internships
* Retrospective Review/After Action Review
* Other:
1. **Indicate the tools and activities you’ll utilize in order to ensure the current incumbent's specialized knowledge is captured, stored, and shared.**This could include actions such as internal documentation being completed, organized, and retained on a secure LAN and/or a knowledge capture interview being conducted and stored on a secure LAN.

**Examples include:**

* Knowledge is captured/transferred from on an ongoing annual basis through mentoring/cross training/job shadowing arrangements.
* Should the position become vacant, an overlap of a minimum of 4 weeks would be required to effectively transfer knowledge from the departing person to the new incoming candidate.
* Ensure connection/meet with ministry Executive, Strategic Advisor, Branch, Corporate Management Services Branch to talk about processes and current issues.
* Ministry orientation and introduction to the Executive members. They would be required to review key ministry and corporate documents (e.g., Ministry Strategic Framework, Service Plan, Division Business Plan, core policy and procedures, financial legislation). The individual would be provided resources and instructed on where to find key individuals in order to build necessary relationships.

## TALENT SOURCING

1. **How do you plan to attract qualified candidates to this position?**
* **Internal to the BC Public Service talent:** Identify sources of candidates likely to have the knowledge and competencies to do the job and explain how you’ll attract them.
* **External to the BC Public Service talent:** Identify sources of candidates likely to have the knowledge and competencies to do the job and explain how you’ll attract them.