

# WELCOME TO THE



**Michigan  
Municipal  
Executives**

2025 Winter Institute

**HOW TO KEEP THE CHAOS AT BAY:  
ENSURING SEAMLESS TRANSITIONS BY  
SUPPORTING REMAINING STAFF**

Presented by:

**Rehmann**

# Your Presenters



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# Agenda

- Current state of succession planning
- What succession planning is
- A simplistic approach to succession planning
- What you should do today to preserve organization

# Succession Planning Quiz



**37%**

**54%**

**12%**

**51%**

**29%**

Succession planning  
can help reduce  
turnover and increase  
engagement



**WHAT IS  
SUCCESSION  
PLANNING?**

# Succession Planning Definition



The process of

identifying

and

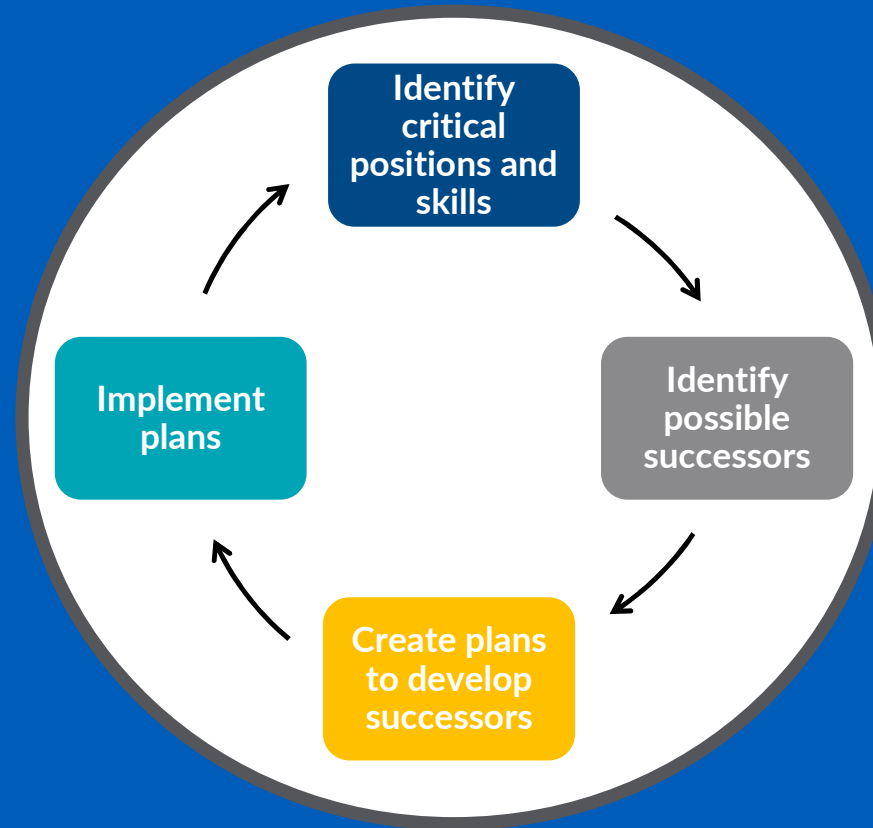
preparing

employees to fill key roles in an organization when

Someone leaves

Any role at any level can be considered “key”

# Succession Planning: The Simple Process



Its all about preparation





# The Importance of a Plan

## ✓ Ensure Continuity of Operations

- Prevent extended and costly vacancies in key leadership positions.
- Maintain stability in government operations and service delivery.

## ✓ Develop Future Leaders

- Provide meaningful growth opportunities for employees.
- Strengthen leadership pipelines at all levels.

## ✓ Foster Workforce Diversity

- Enable decision-makers to shape the future workforce.
- Promote inclusive leadership and equitable advancement.



**Lets Learn and Practice**



**1**

**Lets Analyze Your Situation**

**Are you prepared?**



## Practice - Identify Critical Roles

*On a piece of paper, note card (or a worksheet provided)...*

### **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.



# Is Turnover a Risk?

## Signs someone is at risk of turnover

- Changes in attitude
- Late to work/early to leave
- Negativity
- 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



## If they left tomorrow...

*Pair with someone in the room and collect possible impacts*

1. What impact or disruption would it have in your department?
2. How long would it take to recover?

## Did you get these?



- Loss of critical or specialized or knowledge or skill
- Disruption to day-to-day operations or process
- Relationship impact with constituents, providers, or others
- Reduction in employee morale on team
- Disruption in deadlines, project process
- Missed opportunity for development
- Remaining employees stress, increased workload, engagement



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**Is Anyone Prepared to Fill In?**



# How Ready Are You?



**YES**

Someone is  
100% ready to  
take over

**MAYBE**

Have someone  
in mind, not  
sure they are  
ready

**NO**

No one is  
ready, I may  
have to hire

**UNSURE**

Don't know if  
anyone would  
is ready



## Practice - Identify Successors

*Add this name on your sheet...*

Who is the best person in your organization to take over for both roles?

- How did you make the selection?
- What makes them the best candidate to take over?
- What attributes did you consider?



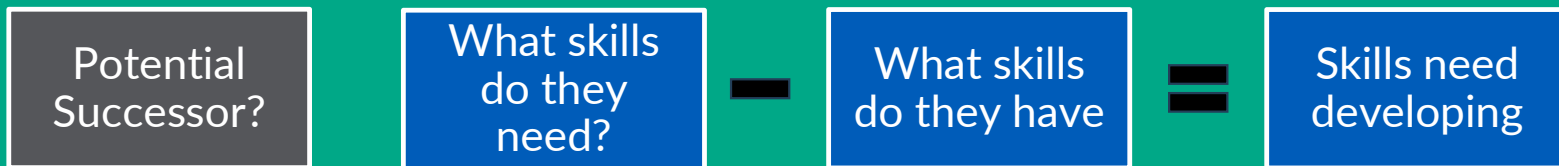
# Identifying and Selecting Successors

Avoid these pitfalls when using these criteria alone to identify successors

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

What happens  
when you  
choose based  
on these  
criteria alone?

# Readiness Based on Skills Analysis



## How do you know?

- Analysis of performance metrics
- Demonstration of the skills on the job
- Manager assessment
- Discussions or interviews
- Training matrixes or development plan completions
- They tell you they know
- It is all about the conversation...

# Practice - Analyze Skills of Successors



*Using your sheet...*

1. Make a list of the skills your successor needs
2. Mark off the ones the have
3. The remaining skills are the development plan



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## Developing Successors

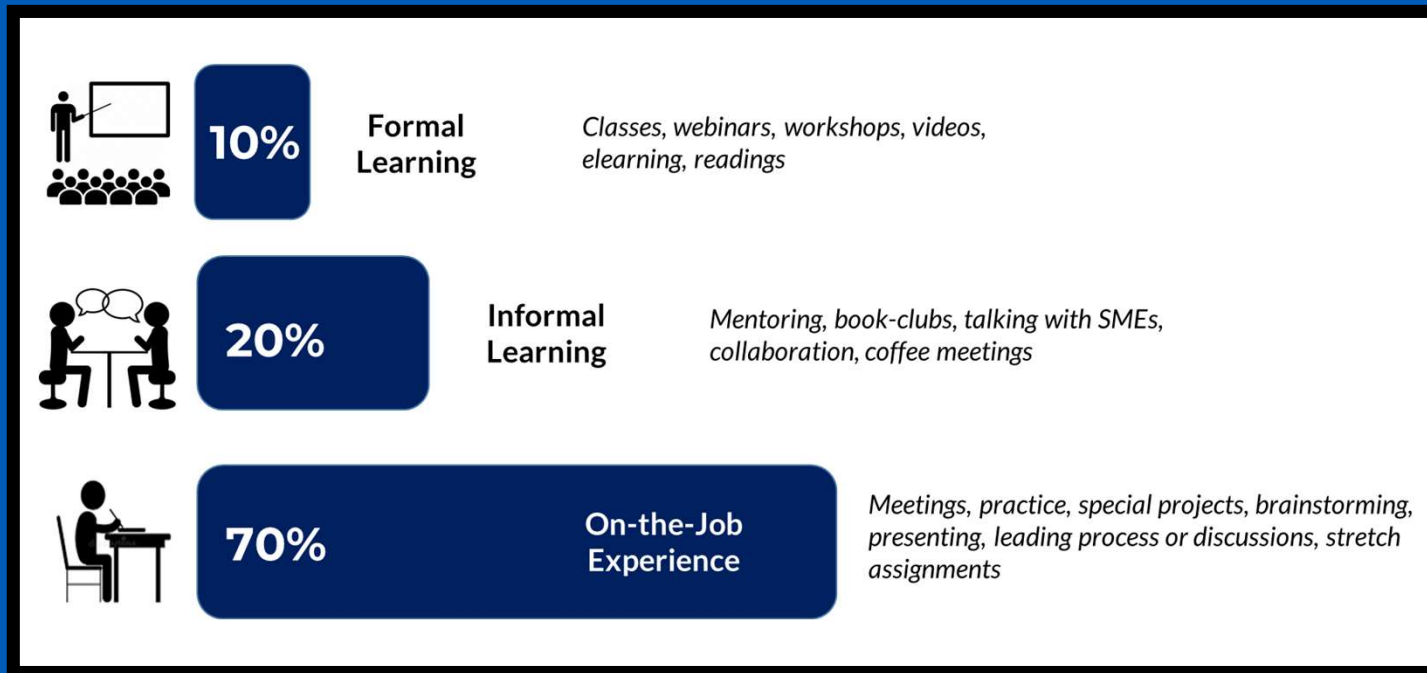
## How can skills be developed?



*Pair with someone in the room and identify at least three ways to develop these skills*

1. What are some ways to develop the needed skills on your list?
2. What methods could you use to close the skills gap?

# How Skills Are Learned



Skills Need Developing: development happens mostly on the job through work experiences

Use internal resources and people for the best outcomes and results



# 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>

# Be Proactive: Prepare BEFORE you need it



## All team members should have development plans

- Each team member should discuss career development with their manager and have a plan
- Offer regular training opportunities, mentoring and job shadowing to cover bases
- Hold managers accountable to ensuring cross-training and knowledge gain occurs

## Getting There

- Are you committed to providing time, guidance and/or resources for development
- Do your managers know how to talk about career development with team members?
- Do managers know how to create development plans?

## Create a Learning Culture

# Career Development Plan Sample



Name		Year				
<b>1</b> Skills or areas of interest	<b>2</b> Targeted role(s) or careers	<b>3</b> Learning Method	<b>4</b> Class Name (if applicable)	Who	<b>5</b> Target completion date	Actual completion date
What skills or area in the company are you interested in learning	If a specific role or job is being targeted, list it here	How will the learning take place? What method will be used? (mentoring, etc.)	If classroom or online training is the method, list the title here	If not classroom, who will facilitate the learning	When do you anticipate having the activity completed	When was the learning actually completed
1.						
2.						
3.						
<b>Monitoring Progress</b>						
<b>6</b> Who will provide feedback and how often?						
<b>Progress Discussions</b>						
Date	Comments					
<b>7</b> Agreement: This plan is agreed to as indicated by the signatures below						
Employee	Date	Supervisor/Manager	Date			

Create a simple document - Include the following items in the plan:

1. Skill needing developed
2. The role (in applicable) linkage
3. Method of development
4. Class/event name if applicable and/or who will lead the training
5. Target completion date
6. Progress documentation
7. Sign/agreement

# Get Started Today



1. Share and discuss with managers and supervisors
2. Identify the most critical roles and/or skills (and/or train managers to do so)
3. Can others perform those critical roles/skills? Don't know? Analyze
4. If no, explore options for capturing and sharing the knowledge and create a plan
5. Require career development discussions and plans for everyone
6. Provide continuous development opportunities to meet all plan requirements
7. Train your managers on these concepts



**TODAY:**

**Protect  
Prepare  
Plan**



**Questions?**