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Current State...

Recruitment		Development		Retention	
Attraction Plan	✗	Succession Plan	✗	Compensation	✓
Recruitment Framework	✓	Competencies -Leadership & Individual Contributor	IP	Rewards & Recognition	✓
Referral Program	✓	Performance Management	IP	Onboarding	✓ ✗
Targeted Diversity Outreach Plan	✗	Leadership Development	✓	Internal Communications	IP
Internships, Co-ops, etc.	✓	Professional Development	✓	Culture/People Plan	IP
Grant Programs	✓	Mentorship Programs	✗	Health & Safety	✓
		Job Rotations	✓	Work Policies (i.e.: flexible hours, condensed work plan)	✓
				Advancement Opportunities	✓

Ideal State ...



Where do we start?



Current State...

Recruitment		Development		Retention	
Attraction Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Succession Plan	<input checked="" type="checkbox"/>	Compensation	<input checked="" type="checkbox"/>
Recruitment Framework	<input checked="" type="checkbox"/>	Competencies -Leadership & Individual Contributor	IP	Rewards & Recognition	<input checked="" type="checkbox"/>
Referral Program	<input checked="" type="checkbox"/>	Performance Management	IP	Onboarding	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
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Grant Programs	<input checked="" type="checkbox"/>	Mentorship Programs	<input checked="" type="checkbox"/>	Health & Safety	<input checked="" type="checkbox"/>
		Job Rotations	<input checked="" type="checkbox"/>	Work Policies (i.e.: flexible hours, condensed work plan)	<input checked="" type="checkbox"/>
				Advancement Opportunities	<input checked="" type="checkbox"/>

Why succession planning first?

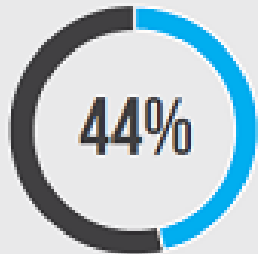
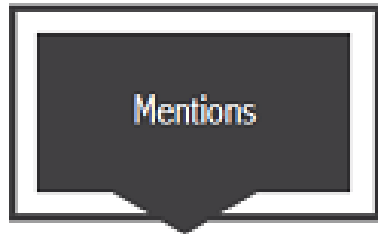
- There will be a number of vacancies within the next 1-3 years and we **DON'T** have a plan
- Without a plan we will struggle:
 - to fill vacancies with qualified staff
 - to provide relevant development opportunities
 - to retain and attract employees
 - **to meet our commitments**

It's CRITICAL

Who did we need to convince that this
was a **priority**?

#1 Issue

ON Municipal Chief Administrative Officer Survey 2016



Succession planning

- "Creating the right workforce"
- "Keeping a full team in the face of competition from other municipalities nearby who keep recruiting my people"

Now where do we start now?



There is no such thing as perfection...

Recommendation



“Seek support not agreement” – a very wise person



The 'loose' plan...



Step 1 - Program Evaluation

YEAR 2017

- Basic – are we meeting project timelines
- Collecting baseline data
 - # of vacant positions prioritized for succession planning
 - # in of participants in program / # of participants leaving /# of staff in prioritized positions leaving
 - % of participants satisfied with program

YEAR 2018

- % of positions prioritized for succession planning filled by internal candidates
- % of participants retained

Step 1 – Position Analysis

Identifying **key roles** and likelihood of vacancy:

- Directors were provided with their dept-specific package from your HR Rep
- HR Reps would work with Directors to identify the positions for the program
- Approx. 5 minutes per **position**

Example of Tool

Dept	First name	Last Name	Position	Criteria A	Criteria B	Vacancy Potential	Comments
Finance	Sally	James	Position A				
Finance	Stu	John	Position B				
Finance	Sam	Jones	Position C				
Finance	Ann Marie	Holleran					
Finance	Rose	Pick-Up	Position D				
Finance	Loretta	Maher	Position E				
Finance	Beatrice	Fletcher					
Finance	Matt	Miller					
Finance	Tom	Garnich					

Criteria A	Position performs mission-critical work to achieve Burlington's service goals. An extended vacancy would have a significant negative impact on the delivery of services because of the criticality of the work and would be detrimental to the community/organization.
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Criteria B	Position would be difficult to fill due to: - specialized expertise and/or breadth/depth of knowledge required - current or projected labour market shortage - history of being hard to fill
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Step 1 – Position Analysis

- **Criteria A&B – Corporate focus**
 - *Positions identified for priority succession planning*
- Criteria A only – departmental focus
- Criteria B only – departmental focus

Step 1 – Position Analysis

Criteria A&B positions ONLY

= 5-7% (*ideal %*)

Step 1 – Identifying LEADERSHIP competencies



Develop People

Leaders inspire and motivate the people they lead. They manage performance, provide constructive and respectful feedback to encourage and enable performance excellence. They lead by example, setting goals for themselves that are more demanding than those that they set for others

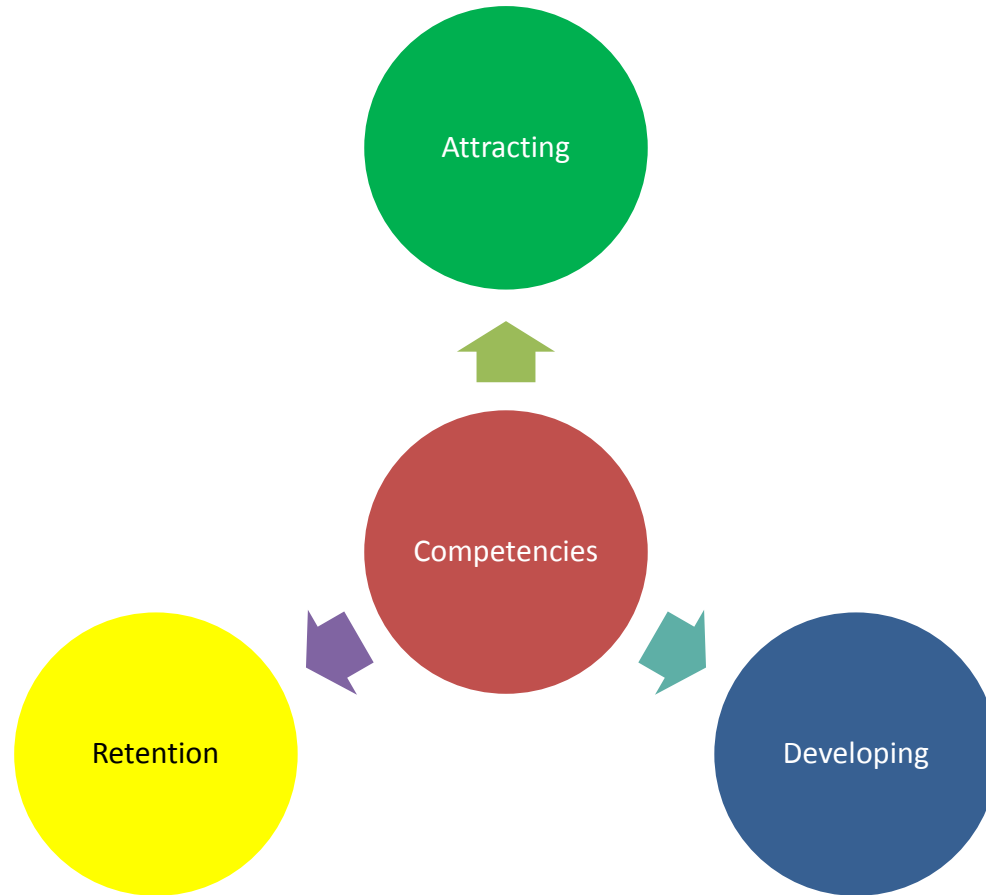
Supervisor	Manager	Director	City Manager
<ul style="list-style-type: none"> • Creates a sense of common purpose and direction in the organization and among colleagues • Sets clear expectations, monitors and evaluates performance • Invests time and resources to support continuous learning • Gives honest feedback, recognizes performance and manages non-performance • Engages employees to gather ideas and input to build cohesive teams • Sets challenging goals for self and models dedication and high performance 	<ul style="list-style-type: none"> • Creates a sense of common purpose and direction in the organization and among colleagues • Sets clear expectations and conducts oversight of performance management practices • Commits to the development of organizational and individual talent • Gives honest feedback, recognizes performance and manages non-performance • Creates opportunities for open and constructive dialogue • Sets challenging goals for self and models dedication and high performance 	<ul style="list-style-type: none"> • Creates a sense of common purpose and direction in the organization and among colleagues • Sets and communicates clear performance expectations and exercises rigorous oversight • Identifies, manages and supports collective and individual talent • Cultivates an environment committed to continuous learning and professional development • Creates a positive environment to encourage open and constructive dialogue • Sets challenging goals for self and models dedication and high performance 	<ul style="list-style-type: none"> • Creates a sense of common purpose and direction in the department • Builds accountability and value for people management within the executive community • Creates an environment where rigorous performance management is practiced • Invests time in managing and developing organizational leaders, individually and collectively • Generates opportunities to engage meaningfully with employees • Builds a commitment to excellence through open and constructive dialogue • Inspires others through personal dedication and actions

Examples of ineffective behaviours for all roles

- Limits access to information beyond the requirements of discretion and policy
- Is insensitive to, or unaware of, the diverse needs, aspirations and capabilities of team members
- Fails to consider the input of others when inclusiveness and engagement are key to team performance and morale
- Allows own stress to interfere with team efforts

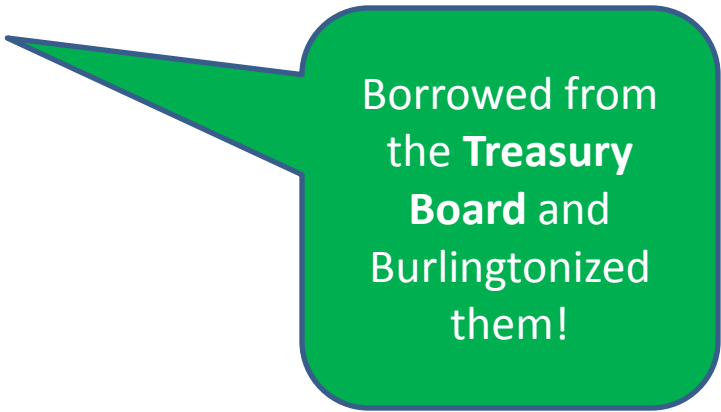
*no such
thing as* **perfect.**
(and that's a good thing)

Why adopt leadership competencies?



We literally “adopted” them...

1. Create and Communicate Vision and Strategy
2. Develop People
3. Uphold Integrity and Respect
4. Collaborate with Partners and Stakeholders
5. Promote Innovation and Guide Change
6. Achieve Results



Borrowed from
the **Treasury
Board** and
Burlingtonized
them!

We told the Directors that...

- We need their FEEDBACK – as the senior leaders these competencies needed to speak to them!
 - Do they make sense?
 - Are they in plain language?
 - Could you use them to evaluate performance?
 - Will they help us to develop our leaders?
 - Is anything missing?

~2-3 hours

Step 1

Program Evaluation - What next?

Position Analysis - What next?

Leadership Competencies - What next?

Program Evaluation- What next?

- Start collecting baseline data
- Determine how results will be communicated – to whom, in what format, frequency, etc.
- Revisit evaluation criteria **often**, re-adjust as required.

Position Analysis - What next?

- FINALIZE - Positions that have been identified as a criteria **A&B** → “Corporate” Succession Strategies
- FINALIZE - Positions that have been identified as Criteria A or B → “Department” Succession Strategies

Position Analysis - What next?

- Communicate what positions will be included in the program
- Identify key/unique qualifications and competencies for identified roles and succession planning strategies for

How do we start to implement this?

HR Reps will guide and support depts. through this process

- First, we need to **Tell** our people and **Listen** to their comments and suggestions
 - Messaging will be provided - consistent messaging key
- Second, we need to collect an inventory of the unique skills required for these positions

Leadership Competencies - What next?

- Introduced City-wide - Q1 2017
- Incorporated leadership competencies in:
 - Recruiting Practices -
 - Development Programs -
 - Retention Activities - IP
 - Performance Evaluations (in process of getting rid of PE...)

Step 1



Communication roll-out starts NOW

What Next?

Step 2 – Participant Selection

The 'loose' plan...

	Activities	
Communicate, Communicate, Communicate	Identify Evaluation Criteria	Evaluate, Reassess, and Revise
	Identify Key Positions	
	Identify Corporate Leadership Competencies	
	Develop & Begin to Implement Succession Strategies	
	Participant Selection	
	Merge Position Data with Participant Data	
	Identify Corporate Development Opportunities (i.e. job rotations)	
	Introduce Targeted Development Plans	
	Launch Corporate Development Programs	
	Celebrate Successes and Learn from Mistakes	

Step 2

Step 2 – Participant Selection

- 3 Options
 - Self select into the program
 - Apply to be in the program but still requires Dept. Mgt support/approval
 - Mgt selects via some sort of an evaluation process (i.e.: High potential identification)

This is what we will be deciding shortly!

Succession Management Program with identified High Potentials - AKA “HiPo”

At the City we will
not be using a high
potential model.
It must fit with
your culture!

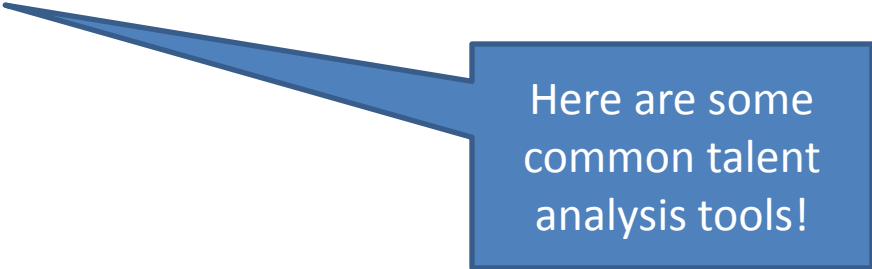


CONSISTENCY
IS THE KEY!



High Potential Identification Tools

- Agility Assessment Questionnaire
- Nine Box
- Calibration Meeting



Here are some common talent analysis tools!

Why select these tools?

- Simple and they work!
- Cost effective
- Robust dialog
- Helps calibrate criteria and expectations
- More accurate than one person's opinion
- Shared ownership

Agility Questionnaire

LOMINGER Learning Agility Model

Name:

PE Rating:

PEOPLE AGILITY—People who know themselves well, treat others constructively and respond positively and resiliently to pressure around them.

People Agility Questions		Examples
Does this individual demonstrate self-awareness?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
Does the individual treat others constructively?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
Does this individual respond positively & resiliently to the pressure around them?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
OVERALL ASSESSMENT OF PEOPLE AGILITY		Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>

RESULTS AGILITY—People who get results under tough conditions and inspire others to do likewise and exhibit a presence that builds confidence in others.

Results Agility Questions		Examples
Does this individual achieve results under tough conditions?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
Does this individual inspire others to achieve results?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
Does this individual exhibit a presence that builds confidence in others?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
OVERALL ASSESSMENT OF RESULTS AGILITY		Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>

Agility Questionnaire

MENTAL AGILITY—People who think through problems from a fresh point of view and are comfortable with complexity, ambiguity, and explaining their thinking to others.

Mental Agility Questions		Examples
Does this individual think through problems from a fresh point of view?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
Is this individual comfortable with complexity and ambiguity?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
Is this individual able to explain his/her thinking effectively to others?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
OVERALL ASSESSMENT OF MENTAL AGILITY		Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>

CHANGE AGILITY—People who are curious and like to build and experiment with new approaches and who constantly strive to develop themselves.

Change Agility Questions		Examples
Is this individual curious and open-minded?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
Does this individual like to build and experiment with new approaches?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
Does this individual constantly strive to develop and improve?	Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>	
OVERALL ASSESSMENT OF CHANGE AGILITY		Development Opportunity <input type="checkbox"/> Acceptable <input type="checkbox"/> Area of Strength <input type="checkbox"/>

OVERALL ASSESSMENT OF LEARNING AGILITY:

DEVELOPMENT OPPORTUNITY ACCEPTABLE

AREA OF STRENGTH

NINE BOX ASSESSMENT:

Box # _____

Growth Potential and Trajectory

<p>High (Upward)</p>	<p>DEFINITION: New to organization (<6 months) and is moving up in the learning curve.</p> <p>ACTION: Coach and monitor to reach full results. Assimilate into the City and role. Clearly convey job expectations. Create learning and development plan.</p> <p style="text-align: right;">Box 7</p>	<p>DEFINITION: Delivers on expectations. Clearly developing in role. More time is needed in current role to demonstrate full capability and yield high contribution. Exhibits considerable growth potential.</p> <p>ACTION: Continue to develop in role. Coach, reward, encourage. Deepen understanding of current role in order to increase contribution. Identify future roles to gain essential experiences.</p> <p style="text-align: right;">Box 4</p>	<p>DEFINITION: Consistently exceeds expectations. Has mastered current job and is ready for new challenges. Demonstrates eagerness to learn and to take on new/more responsibilities. Ready to promote when an opportunity arises.</p> <p>ACTION: Identify essential experiences and Promote when appropriate vacancy occurs. Identify possible ready successors.</p> <p style="text-align: right;">Box 1</p>	
<p>Solid (Upward Or Lateral)</p>	<p>DEFINITION: Is not delivering on expected results. Low performance and contribution in current role. Has not yet acquired necessary functional skills. May be in wrong role or show promise for a different type of role.</p> <p>ACTION: If low performance is due to job fit or lack of motivation, coach or reassign. Coach to full performance. If appropriate create a performance improvement plan and continue to assess.</p> <p style="text-align: right;">Box 8</p>	<p>DEFINITION: Delivers on expectations. Meeting objectives & contributing in role. Displays competence and commitment to assume new roles. May be growth potential upon acquiring greater depth/breadth in role.</p> <p>ACTION: Determine career trajectory. Identify as either growth potential or functional expert. Use stretch goals to determine potential. Continue to assess over the next year to encourage movement out of this box.</p> <p style="text-align: right;">Box 5</p>	<p>DEFINITION: Consistently exceeds expectations. Has mastered current job and is ready for new challenges. May require broader essential experiences before promotion, or may be ready now for a promotion but opportunities may not be available.</p> <p>ACTION: Coach reward and encourage. Keep engaged and broaden current role to expand breadth. Consider lateral movements, stretch assignments or cross-functional projects.</p> <p style="text-align: right;">Box 2</p>	
<p>Low (Current Level)</p>	<p>DEFINITION: Is not delivering on expected results in current role. Difficulty performing responsibilities. Future with the City uncertain.</p> <p>ACTION: Create a performance management plan and if performance does not improve, create an exit strategy.</p> <p style="text-align: right;">Box 9</p>	<p>DEFINITION: Delivers on expectations. Meeting objectives and contributing in role. Limited opportunities exist for upward growth or growth outside of function (this may be due to specialization of role).</p> <p>ACTION: Coach to strengthen contribution. Aim to grow into highly functional expert. Determine if another role (of similar scope) would be appropriate.</p> <p style="text-align: right;">Box 6</p>	<p>DEFINITION: Consistently exceeds expectations. An expert and successful producer who is of great value to the City. May have little interest in (or not be a fit for) new assignment/expanded responsibilities.</p> <p>ACTION: Utilize as a role model and resident expert. Try to extract knowledge. Actively retain. Recognize contributions and reward. Continue to develop as a functional expert.</p> <p style="text-align: right;">Box 3</p>	
		Low	Performing Well	Exceeding

Contribution/Performance



**USE A 9-BOX WITH DEFINITIONS AND RECOMMENDED ACTION
DON'T USE LABELS!!**

Connecting the Agility Questionnaire to the **Nine Box**



AGILITY ASSESSMENT

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	Low	Performing Well	Exceeding
Contribution/Performance			

PE Rating – Current Performance in Role



✓ It **must** have senior management support

- Get yourself some champions!



✓ This is a transformational change initiative:

- be realistic with your expectations
- be patient – the first time through is usually painful
- provide **consistent** and frequent messaging
- acknowledge the concerns/fears
- celebrate the wins

✓ Engage your HR business partners at the planning and implementation stages

✓ Communicate, communicate, communicate!



Thank You