

PORT OF OAKLAND

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Cultivating Talent for Public Sector Employers –
Strategies and Approach for Organizational
Change and Succession Planning

Christopher Boucher

Interactive Poll Feature

Text

CHRISTOPHERB882

to

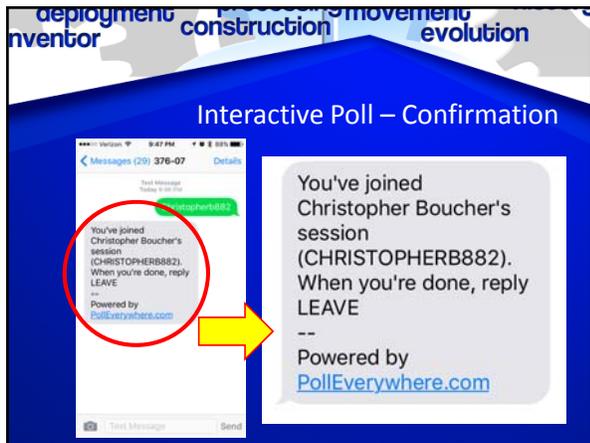
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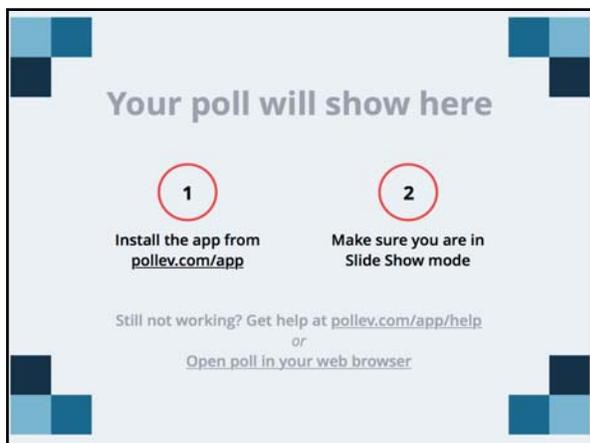
Interactive Poll – Step 1

Text

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National Results – IPMA-HR

Survey Respondents' Organizations

HAS A PROCESS	11
CURRENTLY DEVELOPING A FORMAL SUCCESSION PLANNING PROCESS	27
WILL LIKELY DEVELOP A SUCCESSION PLANNING PROCESS IN NEXT 5 YEARS	33
WILL NOT DEVELOP A FORMAL PROCESS IN NEXT 5 YEARS	16
DON'T KNOW	13

www.slge.org/research/workforce
September 2016

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Succession Plan Defined – per Dilbert

YOU HAVE TO HAVE A LEADERSHIP SUCCESSION PLAN.

THERE'S A FREEZE ON HIRING, SO YOU'LL NEED TO PICK SOMEONE FROM YOUR STAFF.

SO, IF SOMETHING HORRIBLE HAPPENED TO YOU, I'D GET A PROMOTION?

THIS WAS A BAD IDEA.

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What Is Succession Planning?

"A succession plan, simply put, is a component of good HR planning and management. Succession planning acknowledges that staff will not be with an organization indefinitely and it provides a plan and process for addressing the changes that will occur when they leave. Most succession planning focuses on the most senior manager - the executive director, however, all key positions should be included in the plan. Key positions can be defined as those positions that are crucial for the operations of your organization and, because of skill, seniority and/or experience, will be hard to replace."

HR Council for the Nonprofit Sector
<http://hrcouncil.ca/hr-toolkit/planning-succession.cfm>

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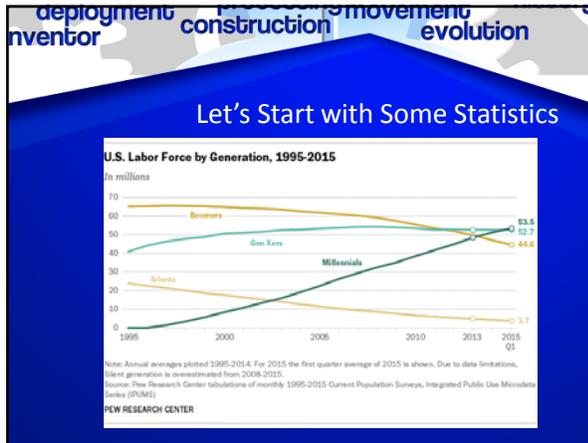
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The Generational Gap

- The Greatest Generation
 - Born: before 1928
- The Silent Generation
 - Born: between 1928 and 1945
- The Baby Boomer Generation
 - Born: between 1946 and 1964
- Generation X
 - Born: between 1965 and 1980
- The Millennial
 - Born: between 1981 and 1997
- Generation Z
 - Born: after 1997



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Why Plan for Succession?

- The workforce is rapidly changing
- Baby Boomers ("Boomers") are retiring at a steady pace
 - In 1995, Boomers represented 49% of the national workforce
 - In 2015, Boomers represented 29% of the national workforce
 - Public sector pensions incentivize Boomers to retire early

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Why Plan for Succession? (Cont')

- Institutional knowledge is going out the door
- Hard-to-fill positions are not readily replaced by Gen Xers and Millennials, including trades, labor, mechanical, scientific, and management
- New employees require training to become proficient
- Lead time for proficiency may be 6 to 12 months
- Lack of structured training or procedures make knowledge transfer difficult
- HR doesn't know how to do every job!
- Some work groups are "decimated"
- Business continuity is at stake
- Service levels are impacted

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Does This Happen At Your Organization?



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Barriers to Succession Planning



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The Port's Story

- Currently, 57% of Port employees are eligible to retire; actual attrition rate (by retirement) was 6% for CY 2015
- Internal study identified the following areas of potential talent gaps:
 - Senior management
 - Technical/professional
 - Skilled trade
 - Singular function/institutional knowledge

The Usual Excuses ...

- We Need a Consultant
- It Is Too Costly
- It Is Too Time Consuming
- It Is Far Too Complex
- It'll Take Too Long
- Our Staff Whine Too Much Already
- The Union Won't Like It
- It's the Executive's Job
- We're Tried, But Failed

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Strategy for Success



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Strategy # 1: Career Fair

- “Open house” for agency staff & the public
- Job simulation exercises
- Meet supervisors and work groups
- Promote hard-to-fill jobs
- Workshop for test taking and interview skills
- Make it FUN!



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Strategy # 2: Job Shadowing or Rotation

- Trial period for agency & employee
- Great for part-time or tenured employees
- Develop internal applicant pool
- Detect aptitude early
- No issues with failing probation



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Strategy # 3: Establish Feeder Classes

- Cluster of jobs with similar KSAs
- Higher level = more institutional knowledge
- Ex: Maintenance Aide – Maintenance Technician – Mechanic – Senior Mechanic – Mechanical Supervisor



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Strategy # 4: Double Filling

- Set transitional period for incumbent and new hire to transfer knowledge, or
- Fill critical position and allow for transition in anticipation of retirement, or
- Allotted FTE's for succession planning purposes



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Strategy # 5: Improve Technology

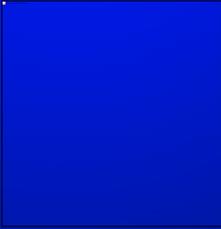
- Automation is the key to the future
- Improved technology and workflow will free up FTEs to allot for succession planning
- Use attrition as opportunities to redistribute workforce



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Strategy # 6: Limited Term Appointments

- Limited term
- Provisional
- Temporary
- Reassignment
- Use for internal and/or external candidates
- Budget "patch" to cover double-filling or non-budgeted FTEs



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Strategy # 7: Management Skills Training

- NOT a management training program
- Teaches core management and supervisory skills for current and future leaders
- Customize to agency needs
- Encourage but control participation
- Develop a pool of "high potentials"



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Strategy # 8: Incentive Pay

- Extra duty pay
- Specialty pay
- Certification pay
- Acting pay
- "As Needed" pay
- Performance pay
- Merit pay
- Training pay
- Signing bonus



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Strategy # 9: Educational Assistance

- Tuition reimbursement
- Professional development
- College partnership
- Certifications and licenses incentive
- Career counseling
- On-the-Job training



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Strategy # 10: Promotional Only

- Great for developing a career ladder or career path
- Incentivizes employees and builds longevity
- Millennials like it
- Recruitment tool
- Good for morale
- Great bargaining chip with unions



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Strategy # 11: Skip A Level

- Hire for potential; train for skills later
- The time to take a chance on the next generation is NOW
- Instill loyalty in your workforce
- Best for supervisory or management level positions
- Excellent retention tool for Millennials



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Strategy # 12: Develop Test Now

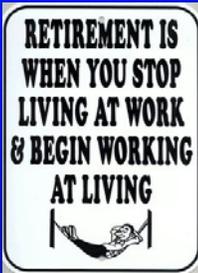
- Use current, tenured employees as SME's
- Develop in-house practical exams, in-basket exercises, and exam materials before incumbents' retirement
- Benchmark results based on tenure and experience
- Bring back retirees as raters



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Strategy # 13: Hire Retirees

- Hire back retirees for training and limited backfills
- PEPPA requirements
 - 960 hours per calendar or fiscal year
 - 180 day waiting period (exception under Government Code §7522.56(f)(1))



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Strategy # 14: Trainee Classification

- "Grow Your Own" classification
- Great for hard-to-fill jobs
- Infuse organization with fresh blood
- Ensure long-term growth
- Avoid competing from the same candidate pool
- Exam based on aptitude and attitude



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Strategy # 15: Up Or Out

- Part of career ladder
- Begins as trainee
- Contractual obligation to move up
- Ensure succession planning to journey level
- Establish competitive standards for promotion
- No slacking off



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Strategy # 16: Educational Partners

- Community colleges
- Regional occupational programs
- Specialty programs
 - Automotive
 - Instrumentation
 - Mechanics
 - Powerplant maintenance
 - Public safety
 - Welding



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Strategy # 17: Labor Partners

- Union trainee program
- Union hall job posting
- Partner to develop curriculum or specialized training for existing staff
- Advisory council
- Co-brand hiring materials
- Special MOU hiring provisions



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Strategy # 18: Start a Consortium

- Industry-affinity group
- Pool money and resources for branding, marketing, training, and sourcing candidates
- Promote career paths across agencies
- Ex: BAYWORK, California Airports Council

A photograph of a glowing sign that reads "Come in We're HIRING!". The sign is rectangular with a white background and black text. The words "Come in" are in a red, cursive font, and "We're HIRING!" is in a bold, black, sans-serif font. The sign is mounted on a wall, and the background is slightly blurred.

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Strategy # 19: Veteran Candidates

- Many have transferable skills from military service
- Excellent work ethics and attitudes
- College educated
- Establish regular veteran outreach
- Partner with veteran organizations

A photograph of a man in a military uniform, smiling. He is wearing a blue button-down shirt over a camouflage military uniform. In the background, there is an American flag and a silhouette of a building with a dome, possibly a government building. The text "Military Staffing We honor your service." is visible in the top left corner of the image.

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Strategy # 20: Hire for the Next Job

- Don't just hire for the current vacancy
- Hire candidates who demonstrate upward potential
- Prepare for future vacancies
- Look for fit & aptitude
- Change the organizational hiring culture

A 3D graphic showing the words "Past", "Now", and "Future" on a timeline. "Past" is in black, "Now" is in red, and "Future" is in grey. The words are placed on a white surface that looks like a road or a path, with a red dashed line running through the center. The background is a light blue sky with white clouds.

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Strategy # 21: Hire Interns

- Cultivate your future employees
- Provide meaningful work for next generation
- Instill loyalty and brand as employer of choice
- Determine work ethics and aptitude
- Promote public service in Millennials and Gen Z



Port of Oakland; 2015 Interns

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Strategy # 22: Look for Volunteers

- Great way to meet your future hire
- Provide coverage for entry level jobs
- Convert to limited term or part-time positions
- Help meet certification or licensing hours
- Work group can assess fit up front



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Strategy # 23: Online Recruiting

- Automated recruitment system
- Utilize social media to source candidates
- Create industry affinity groups to attract talent
- Increase online presence
- A "must" to attract Millennials



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Strategy # 23: Online Recruiting



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Strategy # 24: Steal From Others

- Direct "headhunting"
- Networking is key
- Most appropriate for specialized or management positions
- Hire them to develop a succession plan
- Clone the next protégé
- Consider executive search firms to do the "dirty work"



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Strategy # 25: Reorganization

- Consolidate "siloed" or single-incumbent classifications
- Create new general classifications with broad job functions
- Establish levels for differentiation in skills and responsibilities



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Reorganization Case Study # 1

- Human Resources and Risk Department
- Transitioned “siloed” functions into fully integrated HR Consultants
- Service model changed from “siloed” HR Analysts to departmental HR Consultants
- Full succession chain



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Reorganization Case Study # 2

- Airport Operations Reorganization
- Integrated 7 classifications into 2 Airport Operations Specialist classifications
- Created career ladders for staff to supervisory and management positions
- Cross training of Airport operations unit functions





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Summary

- Don's plan; just do
- Address the most critical need
- Start small; then expand
- Plan must be scalable
- Be "SMART"
- Don't forget training
- Preserve institutional knowledge
- Labor partnership is key

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Questions?

Christopher Boucher
Director of Human Resources
Port of Oakland
Phone: (510) 432-5959
Email: cboucher@portoakland.com