


# Ready or not:
## Succession Planning for Uncertain Times

# Learning Objectives

- Illuminate the meaning and purpose of succession planning
- Identify your organizational risks - operational, legal, labor
- Review proactive strategies  (and what *not* to do) to build redundancy and continuity
- Discuss integrating succession planning into your workforce and labor strategy
- Share best practices and tools

# Why it matters:

- Public sector workforce is increasingly mobile and unpredictable
- Retirement waves, burnout, and generational differences are accelerating turnover
- Institutional knowledge is rarely documented or transferred
- Budget constraints limit ability to backfill roles quickly or at all
- Failure to plan creates operational, legal, and political risk



# Key Potential Risks for Washington Counties

- Single points of failure in critical roles
- Loss of *significant* institutional knowledge and historical context
- Leadership and decision-making gaps
- Operational disruption and service delivery failures
- Increased exposure to grievances, claims, and disputes
- Reduced ability to respond to emergencies or crises

# Where risk lives in your office or department




- Long-tenured employees with unique knowledge
- Roles with no documented procedures or backups
- Positions tied to regulatory or compliance functions
- Leaders managing labor relations or bargaining
- Specialized technical or operational roles

# Decision Framework: Where to Focus First




- Which roles create the greatest operational risk?
- Where is knowledge concentrated in one individual?
- Which roles are hardest to replace externally?
- Where would failure cause the greatest disruption?

**Prioritize your succession planning efforts based on operational impact and risk**

# What steps can you take today to improve your succession planning framework?



# Understand the basics of Succession Planning

- Establish a shared understanding across department leadership
- Focus on **continuity of operations**, not just replacement
- Talk about department intentions around leadership development
- Integrate succession planning into culture and leadership discussions *(put it on the agenda)*
- Recognize succession planning as an ongoing process



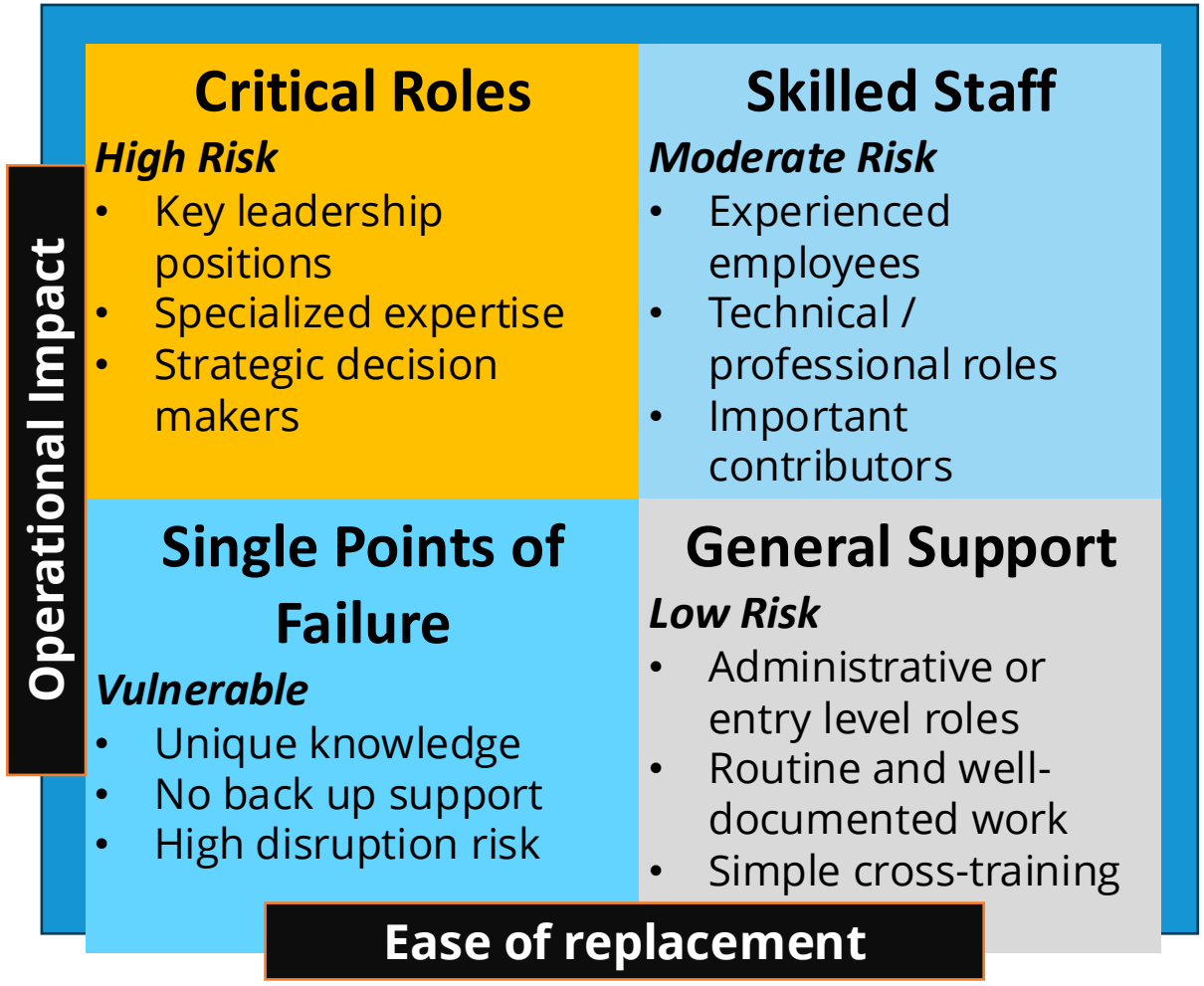
# First, what *not* to do:

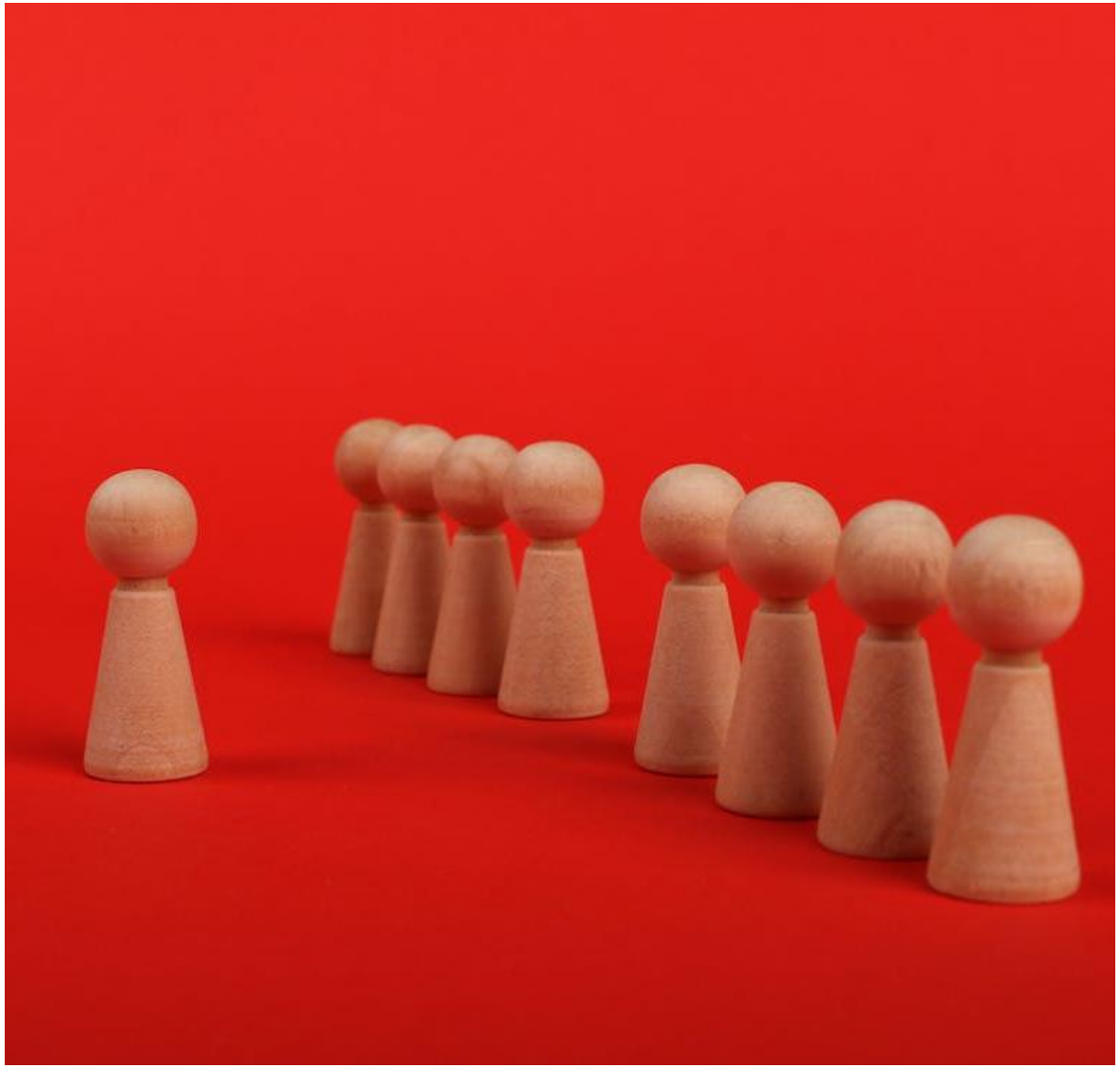
- *Don't:*
  - Go around asking employees when they plan to retire or if they're going to leave.
  - Presume an employee's retirement plans based on age or years of service.
  - Pass over an employee for development or promotion based on age or eligibility to retire.
  - Review, compare or discuss an employee's status with other employees.
  - Build competencies for a role based on a particular person.



# Plan for Unexpected Vacancies

- **Identify** roles where sudden vacancy creates immediate risk
- Pre-designate interim leadership or coverage roles
- Develop clear procedures for emergency transitions
- Maintain updated access to systems, data, and contacts
- Ensure continuity of critical operations during disruption

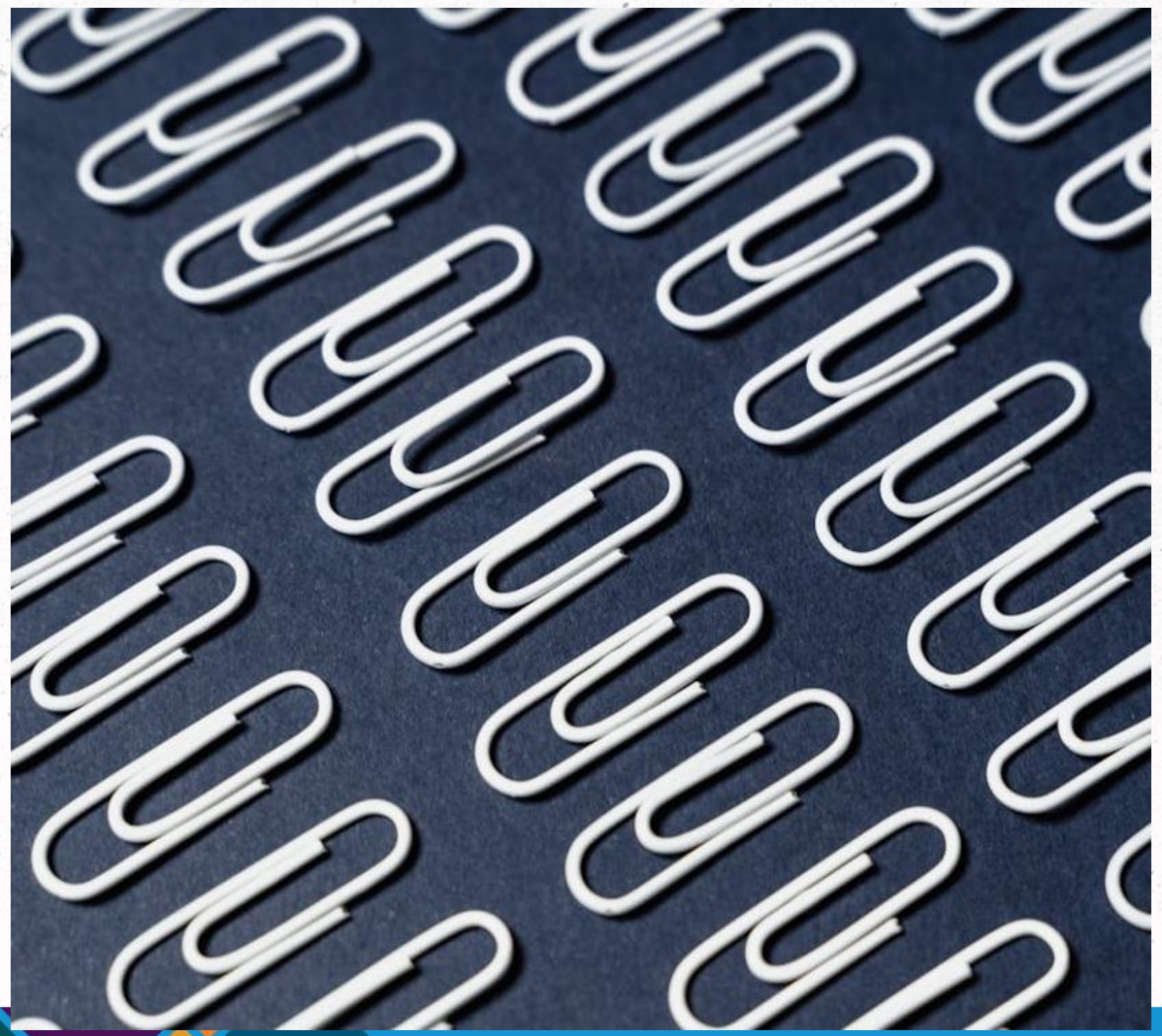




# Aligning Planning with Strategy

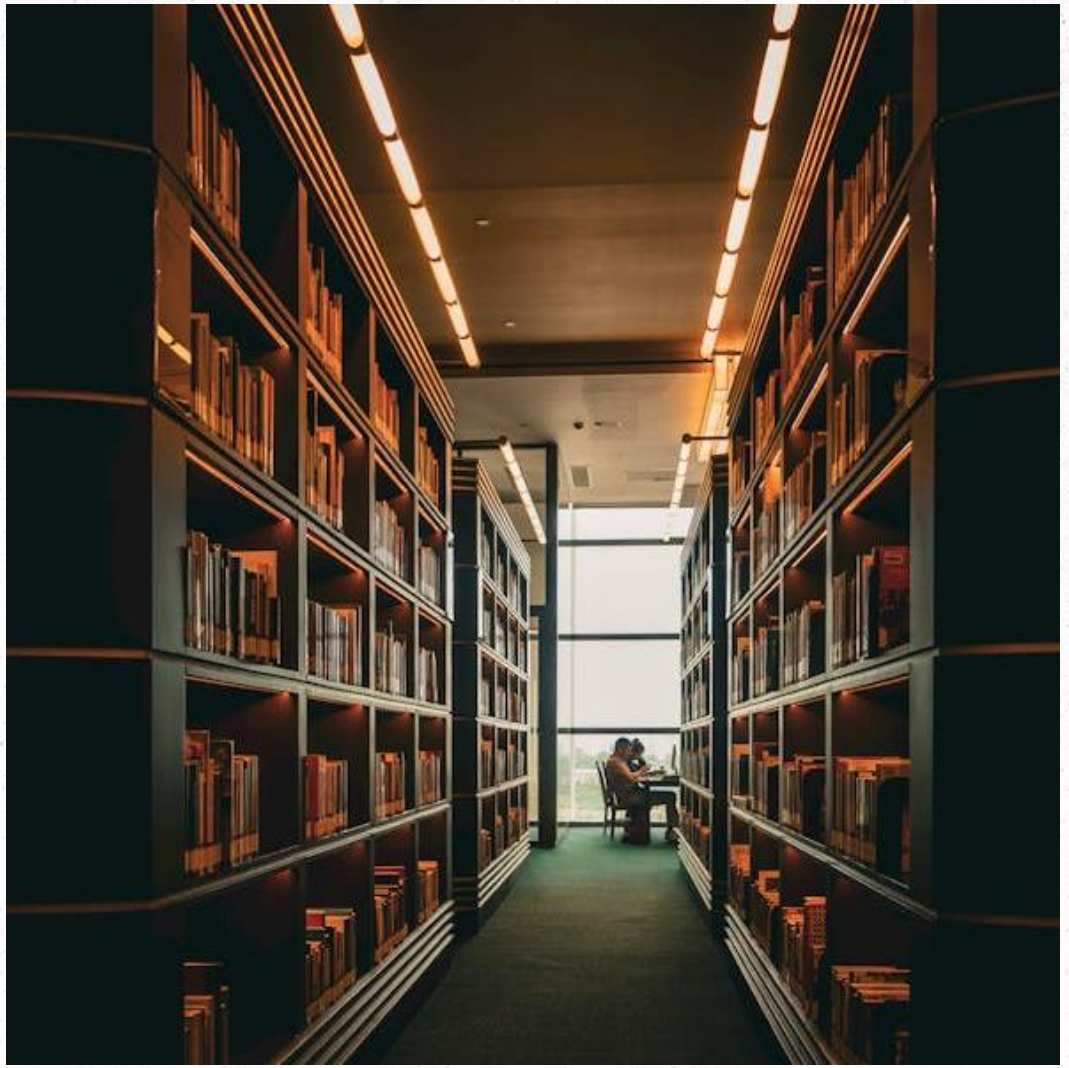
- Identify the workforce needed to achieve long-term goals
- Integrate succession planning into strategic planning processes
- Align workforce development with budget and resource allocation
- Plan for recruitment, turnover, and advancement
- Ensure leadership knows how to support the organizational mission

# Build Redundancy in Skills and Experience



- Cross-train employees across critical functions
- Implement job shadowing and mentorship programs
- Use rotational assignments (out-of-class, acting) to broaden experience
- Develop shared responsibility models – no silos in a pinch
- Ensure backup personnel are trained and ready
- Apply an equity lens to ensure you're fairly distributing chances to learn and grow

# Document Institutional Knowledge



- Capture key processes and workflows
- Document decision-making frameworks and rationale
- Maintain critical contacts and stakeholder relationships
- Record historical context and lessons learned
- Define performance expectations and success metrics
- Update your job descriptions and classification descriptions

# Putting it all Together: Key Takeaways

Start early and treat succession planning as ongoing

Focus on roles and systems, not just individuals

Build redundancy and document knowledge

Regularly review and update plans

Align with labor and workforce strategy

# Additional Resources

Knowledge Transfer Toolkit

Succession Planning Guide


Time for Q&A

# Thank you!

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