



A 2012 GP REDLine Survey addressed topics related to leadership and retirement of staff in agencies and professional offices. Termed “succession,” the survey examined

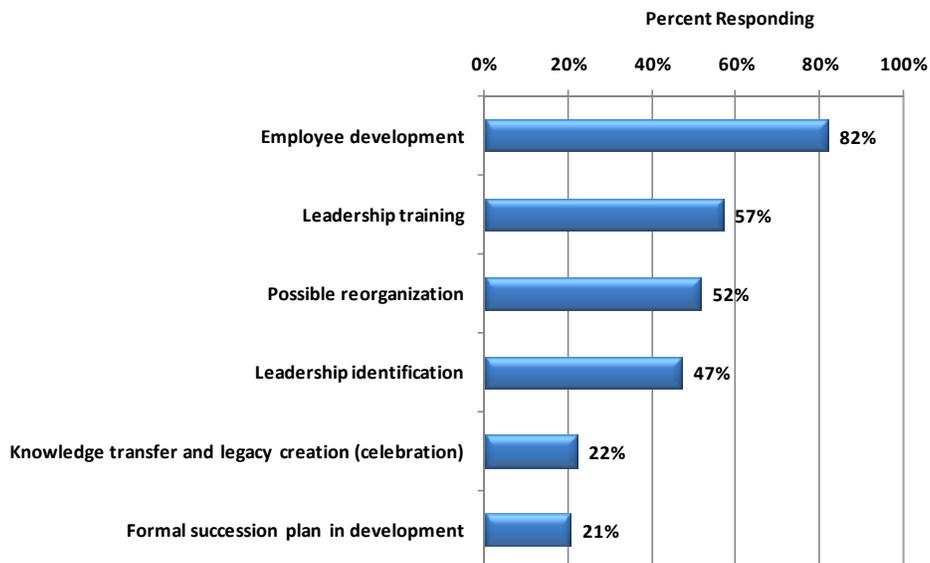
anticipated changes in personnel over time through the eyes of practitioners in the areas such as parks and recreation, public health and planning.

Most respondents expect to lose leadership and senior staff. This REDLine study resulted in 160 completed surveys from around the country. About 74% of respondents indicated that their agency expected to lose leadership/senior staff to retirement within the next three to five years.

Formal written plans for replacement and succession. The study found that only 9% of responding agencies had a formal plan for replacement of key leadership positions.

Steps taken by agencies to deal with issues of succession. The study probed various steps that could be taken to deal with the loss of leadership to retirement. As summarized below, various informal efforts are taking place in many agencies with over 80% of all respondents indicating they are pursuing one or more of these steps. However, “formal succession planning” is the least identified action out of the list presented in the survey, with about one in five respondents (21%) indicating that such plans are in development.

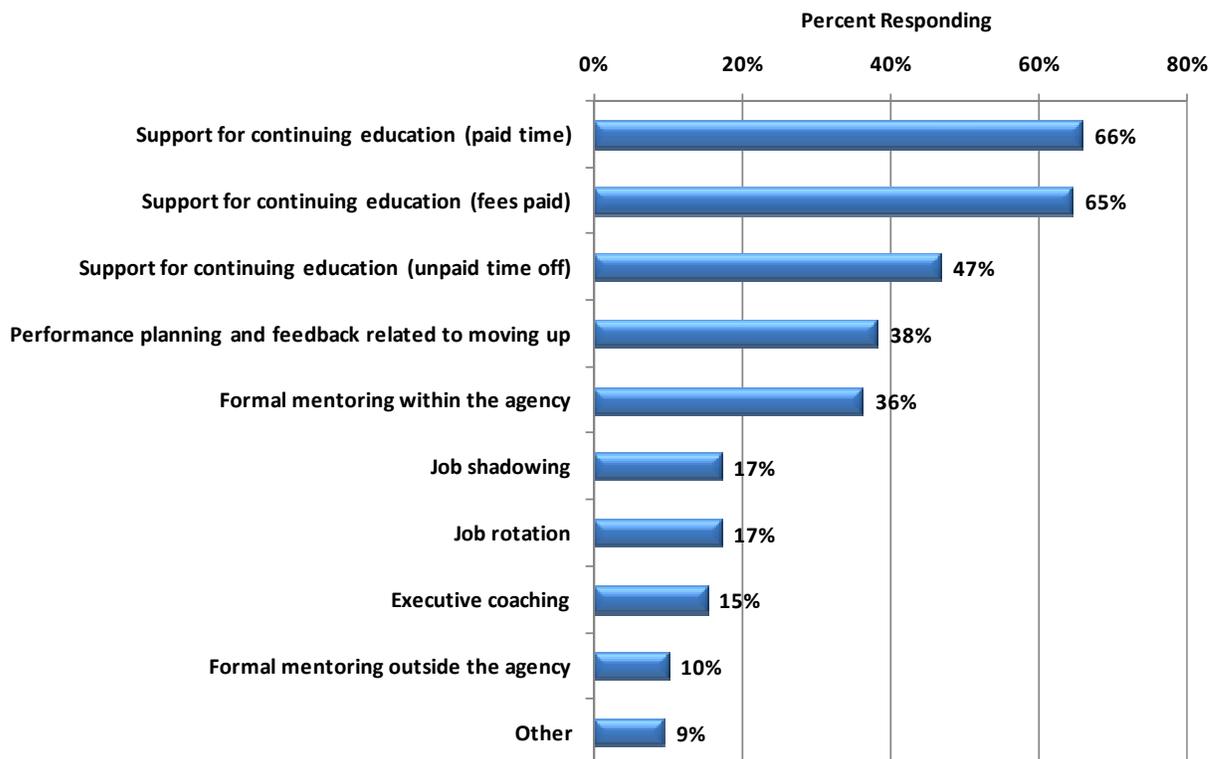
Has your agency taken any of the following steps to address the loss of leaders/senior staff to retirement?



Based on the survey results, it appears that employee development and leadership training are receiving relatively more attention than knowledge transfer and legacy oriented efforts. In other words, the results indicate that while training, development and leadership identification are taking place, formal succession planning and defined efforts to create knowledge transfer are in only limited use at this time in agencies around the country.

Financial support for continuing education. About two thirds (65%) of respondents indicated that their agencies or offices provide some financial support for continuing education with “at least one goal being to prepare employees to move up in the organization.”

Thinking about employees in your organization, would the majority say that they have the following opportunities available to them?



Results also indicate that these types of programs have come under pressure in recent years. Half of all respondents indicated that the financial support for continuing education has decreased, with 43% saying it had stayed the same, and only 4% reporting that it had increased. Again, the data suggest that relatively modest efforts are occurring to deal with succession challenges.

Opportunities that are being provided by agencies and offices. Respondents were asked about the types of opportunities that are being provided in their workplaces. Continuing education,

through time and paid fees (most identified), and unpaid time, were cited by about 50% or more of respondents. Other techniques are receiving relatively modest use; for example, executive coaching and formal mentoring are being used by less than 15% of responding agencies.

Comments on thoughts and experiences about succession planning and changes in organizational leadership. In a final survey question respondents were asked for comments and thoughts. The range of observations from practitioners suggests that the topics of leadership and succession are of concern and consideration. As illustrated, a majority of agencies (over 75%) expect to lose leadership and senior staff to retirement, few agencies have plans, and respondents are indicating a variety of concerns.

| Lose Leadership | Formal Plan | Do you have any further comments on your thoughts or experiences about succession planning and changes in your organization's leadership? |
|-----------------|-------------|---|
| Yes | No | A key challenge is the thinking about the leadership skills gap from current needs of the organization to future needs. Many of the skills exhibited by the long tenured staff should have changed years ago, but were not shifted at that time. This gap creates a void with existing staff to be ready for challenging the status |
| Yes | Yes | Lots of talk about work force planning and employee development but not sure where it will go |
| Yes | Yes | We are currently in the middle of organizational changes due to retirements and lay-offs. Our repurposing plans have significantly benefitted our department in keeping funding for staff positions. |
| No | Yes | I am very much interested in learning the results. As Exec Director, and a baby boomer, I will retire in 5 years. We are starting strategic succession planning in 2012. |
| Yes | No | A key factor to the transition is whether or not the retiring parties are eager or accepting of the fact that they are retiring. To often those in the leadership roles see training or transfer as a threat and often shy away from it. |
| Yes | No | A little concerned being a small community that no one at City Hall has a clear idea of all we do in Parks & Recreation. Concerned that if someone comes in from the outside they will not honor, respect the one on one relationships that have been built up over the years. |
| Yes | No | Being an agency (dept) vs. a Park District we are limited because of the funds across the board for all departments. |
| Yes | No | Better planning is needed. |
| Yes | No | Budget cutbacks could definitely create some barriers to providing training and leadership development opportunities within the agency. |
| Yes | No | Currently working on a business plan for department. Cutting costs through attrition has been the focus the past few years. |
| Yes | No | difficult to mix with budget woes! but very needed! |
| Yes | No | Important |
| Yes | No | In the municipal recreation field in our small community (50k) in New Haven county, CT- leadership planning for the future will become reactionary and of a political favoritism nature. The majority of the directorship, supervisory, and/or |

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| | | superintendent positions over the past 90 years have seen an average of 28 plus years of tenure in the respective position. |
| Yes | No | Much knowledge WILL be lost in the next 3-10 years, but the younger generation here doesn't care. My boss 15 yrs younger than me (I'm 55) says 'throw it away, we don't need it anymore' to most paper copies of contracts and other documents, when these documents are pre-computers and many have not been scanned for posterity. |
| Yes | No | Our organization is currently working to develop and implement a formal succession plan. Plans will also include the addition of job shadowing and other development opportunities |
| Yes | No | Reorganization recommendations are difficult to maneuver when several departments are affected. Models for making these kinds of changes are few. Reorganization is a positive way of shifting new talent into fresh positions when current organizational structures are no longer efficient. |
| Yes | No | Most of the organizations that I am familiar with do not have leadership succession on their radar or they are ignoring the problem. Many agencies are facing reduced budgets and are looking to retirements as a means of painless reductions in number of employees (avoiding a reduction in force by not filling many positions vacated by retirement). Little thought is being given to training or mentoring those who will be tomorrow's leaders. On the other hand, the poor economy and the value lost in people's retirement accounts may result in the pool of experienced leadership coming via the re-hiring of retired leaders from other agencies, because of their need to supplement their retirement income. |
| Yes | No | Running lean makes the issue more challenging. This is not going to be easy. |
| Yes | No | succession planning is a poor path to travel--over the years the need for succession wasn't needed but today consultants need to create a new animal and here we have it----succession planning means more of the same---open recruitment guarantees a fresh face and perspective--- |
| Yes | No | Unfortunately, we are a small organization and have a few folks all leaving with 12-18 months time. Subordinates either lack ability, have lack of respect from coworkers, or are disinterested in moving up. |
| Yes | No | We are just getting started on succession planning and realize that we are probably 5-7 years behind where we should be... |
| Yes | No | We are severely lacking in succession planning. |
| Yes | No | We are trying to put as much in writing as possible. Updating Operations Manuals etc. Even trying to create a history timeline for the Department. We are aware that a lot of information may be lost and often find ourselves saying...'anything that would make it easier for that next person'. Some solid planning ideas to continue moving forward are greatly appreciated. Thanks for doing this survey. |
| Yes | No | We have 15 out of 70 fulltime employees involved in succession planning |
| Yes | No | We have lost over 100 years of institutional knowledge with retirements within one year. We have considered this an opportunity to reinvent ourselves as we are forced to operate under a new paradigm of efficiency, cost recovery and new business model. |
| Yes | No | We need to do more. |
| Yes | No | We went through a formal process of succession planning and training then made |

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| | | a major change with two key retirements and merger with another department recently. We are still experiencing ongoing changes and have not gone back to further succession planning for the next wave. |
| Yes | No | We were a national leader 5 years ago. As a result of management changes and the recession, we ended out mentoring and transformational leadership programs. We have also cut back on staff training and development. |
| Yes | No | We're living at a time when people who should retire aren't....because they're afraid they don't have enough money to retire on. And those behind them will have fewer opportunities to move up. This is discouraging good people from sticking around. |
| No | No | I think this is a critical part of development for high performing staff. I think it is important to ask them to expand their knowledge in the field, take on new responsibilities and look for advancement. That is the only way we can bring along our workforce and train the leaders of tomorrow. |
| No | No | In our small organization, teamwork is critical. I feel basic knowledge about what needs to be done is there, but some of the higher levels of knowledge need to be exchanged on a regular basis. Continuing education is used at a minimal level by most employees. Management does not regularly promote it to the rest of the employees. |
| No | No | This is my 'encore career.' After 32 years as P&R Director, I retired 2 years ago to assume a newly created position (Facilities & Community Affairs Manager) with our local school district. This new administrative position was created as part of a district reorganization following the retirement of several employees. My skill set was perfect -- major tasks are facilities scheduling & permit management, school safety, event management, oversight of community aquatic program staff, aquatic & fitness program development & execution, and creation of new revenue streams. When I leave in another 8 years, I expect that there will be another reorganization but at least at that time all the systems and programs will be in place. PA school districts are in dire financial straits due to Act I legislation. |
| No | No | This survey is pointless |
| No | No | We are a one person organization. |
| No | No | We have a couple of people that can fill in for each other or take over the responsibilities if needed. |
| No | No | We just had a leadership change last year as our director retired. |
| No | No | With the lost of staff and positions not being filled, senior staff have been removed from manager positions and rehired at supervisor positions. There also have been no cost of living increases or step increases since 2008. I don't believe that senior staffs are valued like they have been in the past. |
| No | No | You questions make me realize just how much we take for granted regarding our employee operations, support and coaching. |