

# AP 161b. – Succession Planning

**Associated Board Policy:** 161.00 – Requisition and Selection – Non-Faculty Personnel

**Procedure Owner:** Director of Human Resources

**Related Procedures:** AP 181 - Guidelines for Reduction in Force, AP 109 - At-will Employment, AP 114 - Performance Appraisal

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## I. Procedure Scope and Purpose

Succession planning is a part of the overall process of developing a sustainable workforce. This procedure will assist the College in identifying critical positions within the institution and outlining a plan to make sure these key positions have the talent needed to operate the institution and ensure a smooth transition after key employees leave the college

## II. Definitions

Data points: provide a snapshot of current employees, including years of service, retirement eligibility, high turnover areas and potential successors.

Key positions: positions that are deemed mission critical and are needed for the operations of the college

Talent pipeline: employees available for temporary replacement or permanent replacement in key positions should a vacancy arise.

## III. Procedure

### A. Identifying key positions

Identify the specific positions in each area of the College/Division where planned replacement action is essential. It is not normally intended that this process maps potential replacements for every position.

1. Obtain general background and data points to create a snapshot of the workforce.
  - a. Date of hiring
  - b. Years of service
  - c. Skill level distribution – interims, pipeline or potential successors
2. Separation trends in positions (over the years and by position)–
  - a. how long do employees stay?
  - b. high turnover
3. Time to hire – which positions take the longest to fill
4. Identify critical and vulnerable positions
  - a. Which positions have no identifiable successor
  - b. Impact each position has on the organizations mission (mission critical)
5. Develop profiles of the critical and vulnerable positions and the skills needed

## B. Identifying potential successors

Identify talent pipeline for temporary transition should a vacancy arise.

1. Consider range of timeframes, such as
  - a. Immediately
  - b. Within 1 year
  - c. Within 2-3 year
2. Determine urgency and nature of employee development or targeted recruitment
  - a. Is external recruitment needed
  - b. Is there a need for considerable development and training?
  - c. Link development plan to performance review

## C. Identifying relevant development strategies

1. Development strategies for 'potential' successors may include:
  - a. formal leadership/management or technical skills training
  - b. opportunities to act in the role or other similar roles;
  - c. working on identified projects;
  - d. mentoring or coaching;
  - e. provision of additional responsibilities to build skills/confidence; and/or
  - f. planned 'on-the-job' training.

## D. Linking to the performance and development review

1. Development plans for individuals should be included in their Performance and Development Review.
2. Care must be taken to ensure that potential 'successors' are not given the expectation that they will be appointed to a key position.

## E. Reviewing and evaluating


The Human Resources office will evaluate the appropriateness and effectiveness of the succession planning framework.

1. Determine data points for evaluation of the process
  - a. Number of employees identified for position succession
  - b. Organizational performance overall
  - c. Reduced risk associated with employee turnover

## IV. Effective Date(s)

This procedure first became effective: February 27, 2024

## V. Signature and Title

This procedure is implemented by:   
Title: President