

Succession Planning and Organizational Change



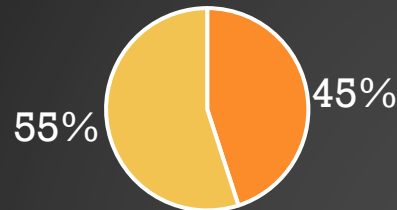
Managing by Network

*Raise your hand if you've
handed over or taken on a
partnership midstream.*

How did that go?



Our agency / organization **supports tools and best practices related to succession planning** and transferring partnership responsibilities from one employee to another employee.



Agree
Disagree

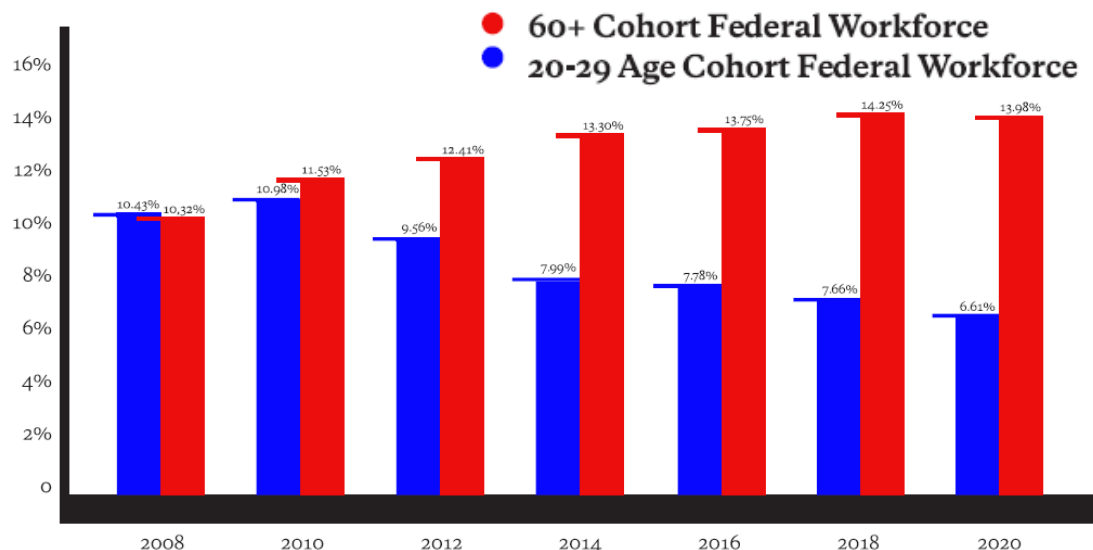
MbN 2023 TNA

Why it Matters

“Today, **less than 7%** of the Federal workforce is under the age of 30 and **nearly 28%** are eligible to retire in the next 5 years.”

President's Management Agenda

The gap in Federal employee age range continues to increaseⁱⁱ



Succession Planning Best Practices

- **A**nticipate and plan ahead
- **B**e realistic
- **C**ommunicate
- **D**ocument
- **E**ngage partners and peers
- **F**ollow up



*Who will be
our new
contact?*

How will this
impact **funding,**
resources or
schedule?

When will this
occur and will
they fill the
position?



Will our work
continue to be
a **priority** for
the agency?

Can we
stay in
touch
with you?

Engage Your Partners

Inform Your Peers



- Discuss hand-off with Supervisor
- Check-in with Budget Officer, G&A and Contract Specialists
- Plan communications with Public Affairs
- Discuss impact with colleagues

Handover Memo

- Document important relationships and collaborative work
- Contact, roles, history, vision
- Commitments and schedules
- Agreements or procedures
- Project materials
- Communications strategy

BLM Succession Plan

WHAT IS A PARTNERSHIP SUCCESSION PLAN and WHY IS IT IMPORTANT?

A smooth transition between current agency leadership, the groups they have been working with, and the leadership with whom these groups rely on, is especially important. Our ability to solve natural and cultural resource related problems over the long run depends on the quality of our long-term relationships. A succession plan, the "Handover Memo," is a tool for establishing and maintaining community relationships associated with ongoing partnerships and collaborative work. The "Handover Memo" is designed to contain information about relationships with partners, collaborative efforts underway, commitments that have been made, and any work agreements or procedures that partnerships are using with the agency/unit. The "Handover Memo" is completed by the outgoing leader prior to their departure and addressed to the incoming leader. It is not intended to be a comprehensive list of activities and/or projects. (Refer to Appendix 8: Transition Management of Agency Personnel – the "Handover Memo.")

USFS Handover Memo



Tool: Forest Service Handover Memo

Summary

The Forest Service's handover memo process enables an outgoing agency leader to share information with their replacement. The memo documents important relationships and collaborative work.

Keys to Success

Written documentation of collaborative efforts and key community relationships, consistent use of the handover memo tool by

Handover Memo Eases FS Staff Transitions

The challenge of rotating Forest Service line officers is a well-known barrier to community and forest-level collaboration. It takes time to develop good relationships, and when a key agency contact is transferred, a collaborative effort can stall out while community members establish rapport with the new person.

In 2006, (former) Chief Dale Bosworth issued a directive to Forest Service employees to use a leadership transition process when leaving their post. Specifically, he asked those in key leadership positions-- Forest Supervisors, District Rangers, Research Program Leaders, State and Private Forestry field representatives, and Staff Directors at national and regional levels who work extensively with partner and cooperator networks-- to prepare a handover memo for the incoming employee.

In the handover memo, the outgoing agency leader provides information critical for the new person to be successful in doing



Successor Follow Up: Listening Tour

PRO TIPS: ONBOARDING FOR PARTNERSHIPS

- Plan overlap of old & new
- Decide ahead who will train and onboard; “strike team”
- Hire and onboard in cohorts
- Leverage partners with local knowledge and continuity
- Get on the ground and build personal relationships

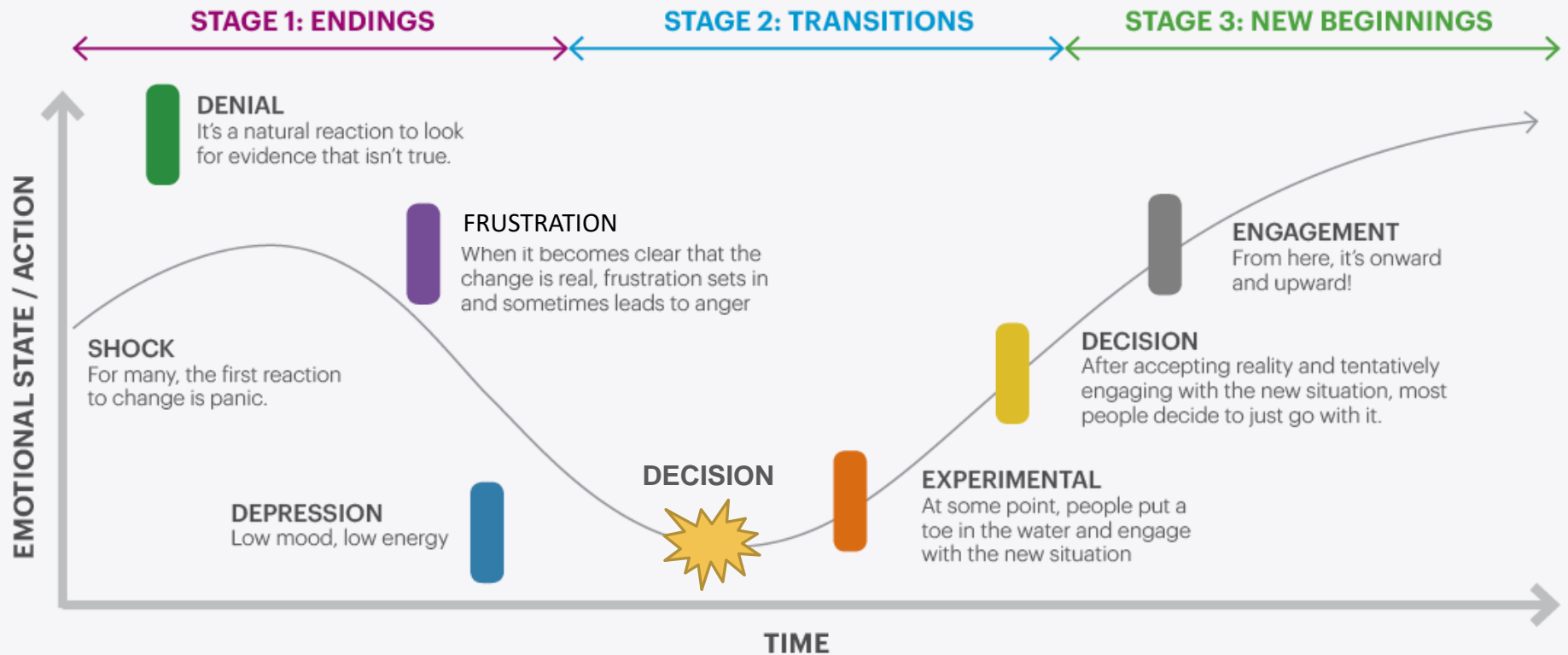


Jacqueline Emanuel,
USDA FS NPO

*Adapting to Staffing
Transitions Peer Learning
Webinar, NFF*

<https://vimeo.com/706705838>

On the Emotional Roller Coaster...



Clarity

Empathy

Motivation

Capability

Knowledge

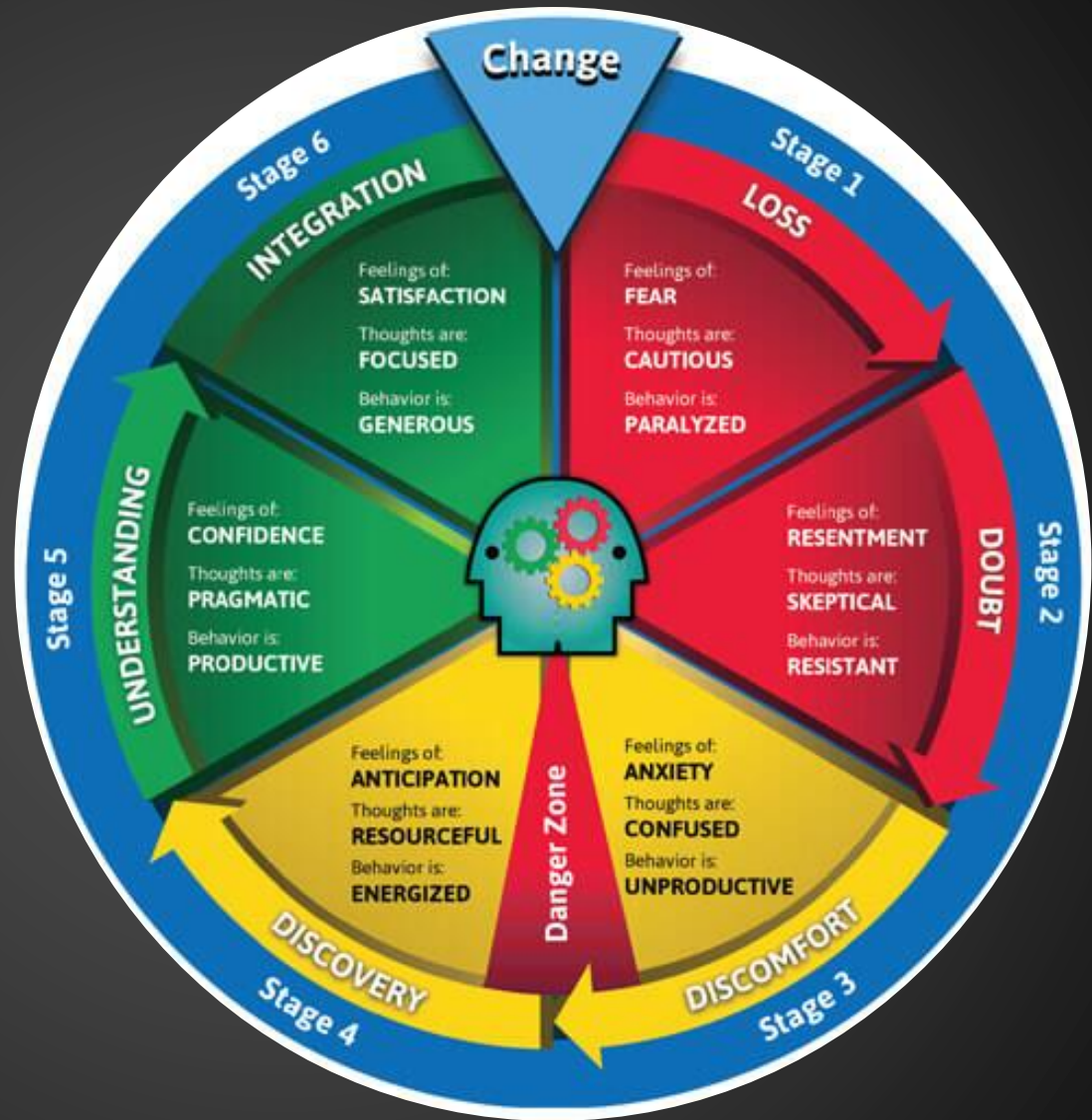
THE KEYS TO ENGAGEMENT

The Change Cycle

We may go around the cycle several times.

People experience
change in their
own way, at their
own pace.

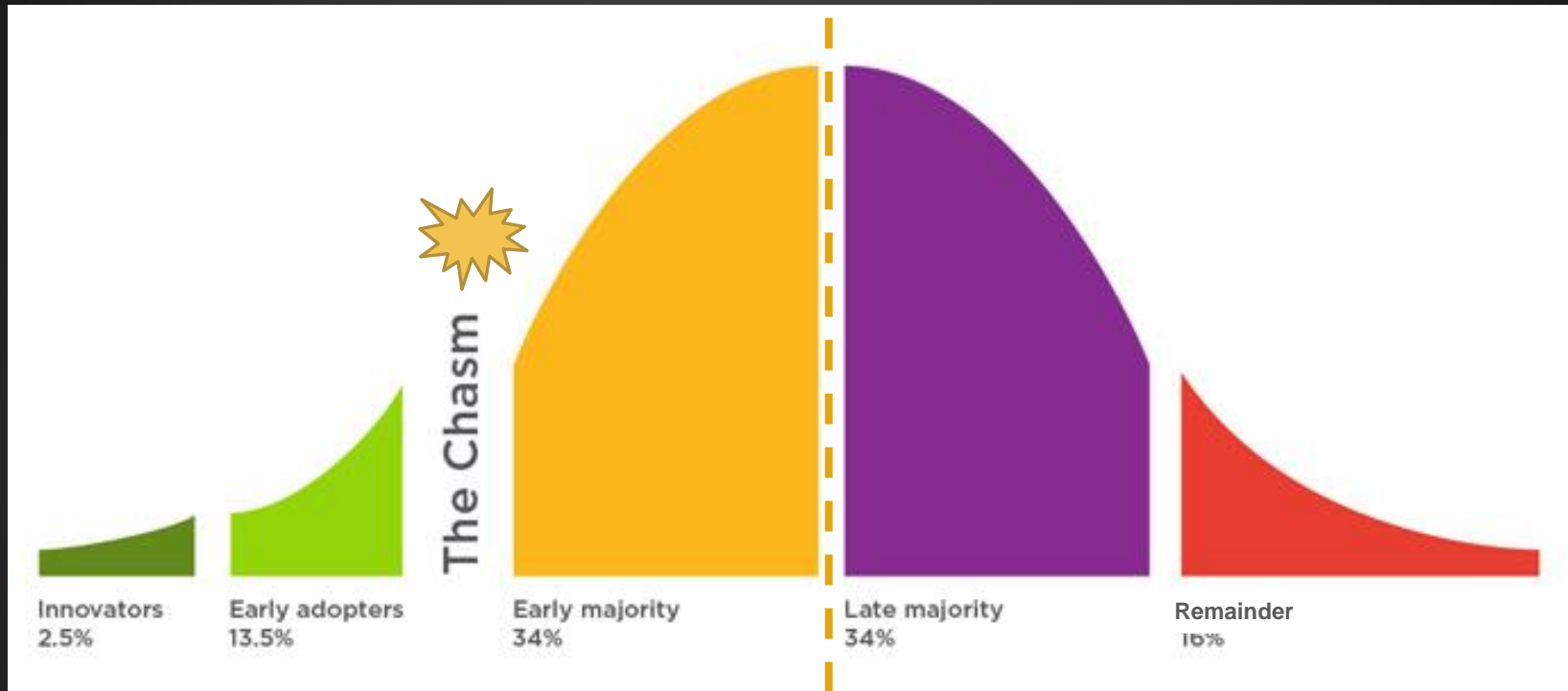
Be mindful of
where you and
others are.



*What is an organizational
change you are part of
right now?*



Change Adoption in Organizations



- Empower early adopters as Change Champions
- Critical moment: “Crossing the Chasm”
- Leverage early majority as multipliers to build momentum. Communicate early and often. Define the value. Build excitement.

Seeing it Through

Preparing

- Change leaders
- Organizational desire for change
- Vision and strategy
- Change program
- Cross-functional teams

Implementing

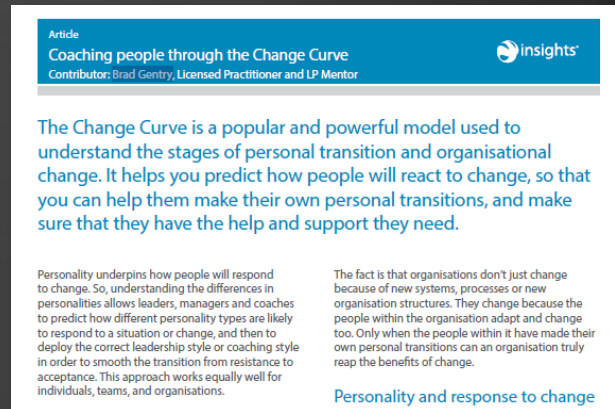
- Communicating
- Involving and empowering people
- Celebrating successes
- Monitoring, learning, adapting
- Institutionalizing, training

Additional Resources

- *Transforming through Crisis: Building Tomorrow's Organization Today*, by Carina Cortese (10 min read)



- *Coaching People Through the Change Curve*, by Brad Gentry (10 min read)



The only way to make sense out of
change is to plunge into it,
move with it, and join the dance.
- *Alan Watts*

