

**CAL**  **HR**  
**2017 Conference**

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*your state, your government, your future*

## SUCCESSION PLANNING

# Welcome

## Introductions

- Jeff Douglas, CalHR
- Paul Ogden, FTB
- Sarah Gessler, CalHR
- LaTrice Moore, CalHR
- Erica Salinas, CalHR

# Business Case

- Changing Workforce Demographic
- California State Auditor
- State Leadership Accountability Act
- 2016 Statewide Workforce Planning Report

# A Change of Approach

- New Policy: 2901
- Collect and Report
- Workforce Planning Cohort Training Program
- Succession Planning Training Program

# Plan vs. Program

Succession Plan  
VS.  
Succession Program

# Succession Planning Case Study #1

## **Franchise Tax Board**

## **Executive Assessment and Development Program**

# Succession Planning Case Study #2

**CalHR**

## **Executive Leadership Preparation Program**

# Strategic Alignment





# Alternative Formats



# Keys to Developing a Succession Plan

- Comprehensive View of Pipeline
- Something for Everyone
- Leadership vs Technical
- Scalable
- References “Succession Programs”
- Evaluation

# Leadership Succession Plan

Developing the pipeline:

- Bridging into supervision
- Supervisors
- Managers
- Executives

Aligned with Leadership Training Policy

# Moving Forward

- Achievable
- Tools and Resources
- Succession Planning Workshops
- CalHR Succession Plan

# Thank You

## Questions

# Contact Us

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