

# Succession Planning: How one department did it

**Julie Zimmerman**  
Chief Knowledge Officer  
Management Partners  
Cincinnati, Ohio

**M**ost local government managers are aware of the Silver Tsunami—the fact that large numbers of public-sector employees are set to retire in the coming years, and finding their replacements is becoming more difficult as the workforce changes.

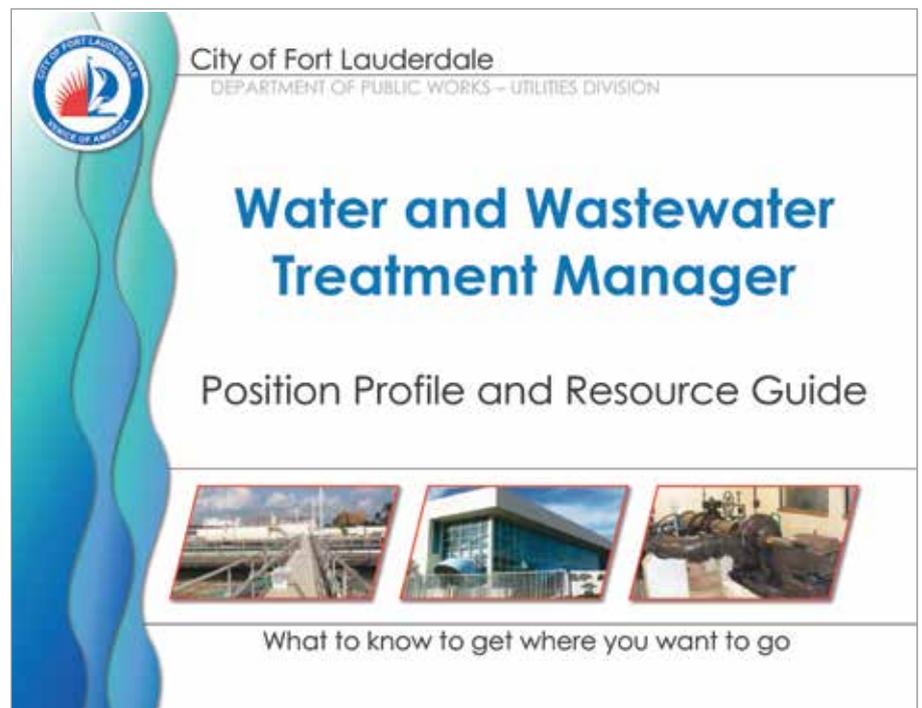
But the reality of the situation hit leaders in the Fort Lauderdale Public Works Department in 2014 when they surveyed their employees and found that more than a quarter of them were eligible for retirement in three years. While all of those eligible were not likely to retire within that timeframe, the idea that up to 28 percent of their workforce could leave in such a short window prompted them to look at how to prepare the organization to withstand such disruptions.

“We knew our vulnerability wasn’t consistent across the department, and it was most evident in skilled water and wastewater positions, especially among treatment, lab and supervisory roles,” says Paul Berg, Fort Lauderdale’s Public Works Director. “It was difficult to impossible to achieve full staffing, and when we advertised positions, we weren’t getting the numbers or quality candidates we needed to address the vacancies.”

As department leaders talked to other local government managers in the area, they found that most departments were experiencing the same issues. They couldn’t just hire from other agencies, and comprehensive advertising wasn’t enough to build up their workforce. As they looked closely at the issues, it was clear that they had to take action over the long haul to retain talented people in the department through training and promotion, in

addition to attracting new employees from outside.

It also became clear, as leaders did research and talked to other managers, that there were many different avenues they could pursue in addressing these challenges. They concluded that they needed an outside consultant because they didn’t have the technology or expertise to manage a succession planning project, particularly alongside managing the day-to-



Cover of the City of Fort Lauderdale's Position Profile and Resource Guide

day work of the department. After an RFP process, they hired Management Partners, a firm that specializes in providing management assistance to local governments, to help figure out how to do succession planning.

Because the City's Human Resources Department had also been considering a citywide succession planning effort, the Public Works Department collaborated with them to make sure their efforts didn't conflict with or repeat any work that Human Resources was planning to do. At first they envisioned a project that examined the entire department all at once, but they settled on a pilot program focused on one division, with the intent to learn from the pilot and then use that with the other divisions. After analyzing retirement eligibility, vacancies and the significance of various positions, they focused on the water and wastewater treatment functions, which included the lab on both processes, for the pilot program. They identified 12 priority positions, including wastewater treatment manager, environmental chemist and industrial technician, which they deemed as critical.

Amy Cohen Paul and Nancy Hetrick of Management Partners surveyed the entire department to gather feedback on training and promotion opportunities and other perceptions. The consultants then interviewed employees in the priority positions and developed position profiles that included information on fulfilling job requirements, training, historical knowledge and contacts necessary to complete the job. They developed a profile for each position deemed critical.

"The profiles function as a repository of important information, as well as a resource for current and incoming staff," Paul says. "We worked to identify the critical competencies—those skills and traits needed to succeed in each role—and created a template for acquiring those skills both internally and externally."

Adds Hetrick: "After completing and reviewing the profiles, we conducted training on the tools and approaches of the succession planning program so the department could replicate this pilot effort in other divisions. Throughout the project, we worked with the Public Works team to get feedback and input from across the department."

The priority wasn't just to figure out how to achieve and maintain full staffing; it was also to go through processes and procedures to capture institutional knowledge and catalog our services and assets like hydrants, valves and pumps. It is a difficult process, especially in a city like Fort Lauderdale, which was built out in the 1970s without the

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benefit of a fully developed geographic information system (GIS). That means it's especially difficult to lose employees who have been with the department for 30 years and know where all the valves are. As those people retire, the City will still lose some of that knowledge, but the City is purchasing a comprehensive asset management system to inventory their physical assets that will help soften some of the blow.

The Public Works Department still has challenges even after undergoing this succession planning effort. Leaders would like to improve their training budgets and schedules, and they will continue to send their employees to continuing education to get the licenses and certifications they'll need. But the department now has a better understanding of where it is going and what leaders need to do to maintain and improve it.

"It helped to take the time to define our problems and explore possible approaches," Berg says. "Launching it as a pilot in their most critical areas helped as well. It's always easier to replicate successes at a small scale than tackle everything at once. In this case, it was better to narrow the scope and focus on a few positions where we had the most problems than try to do it all at once."

Succession planning is vital to the health of an organization, and it's not something leaders can achieve and be successful working on in their spare time. It needs to be a priority. Managers can't look at it as a project; it needs to be the way they do business and incorporate all these elements into recruitment and training. These are all long-term strategies. Department officials need to be patient but also direct about maintaining the effort and keeping these at the forefront as they are running the organization.

*Julie Zimmerman can be reached at (513) 543-1501 or [jzimmerman@managementpartners.com](mailto:jzimmerman@managementpartners.com). *



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