COMMUNITY ACTION
Washington County, Oregon

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SPHR, SHRM-CP

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WHAT YOU WILL TAKE AWAY FROM THIS SESSION:

• Ways to effectively involve board and staff in developing succession plans for critical positions
• Key “people management” competencies to look for and develop in your future leaders
• Ways you can support internal promotions and succession planning, improve retention and quality of your management team, and ensure consistency in people processes and practices as an Agency via training
  • Supervisor Development Training
  • Existing Supervisor Continuous Learning
EXECUTIVE SUCCESSION PLANNING

• Long-term Executive Director
  • 42 years with our Agency
  • 32 years as our Executive Director

• Starting our research early
  • Studied successful leadership transitions (nationally & locally)

• What the research showed us
  • Replacing long-term respected leaders begins by looking **within**
EXECUTIVE SUCCESSION PLANNING

Steps taken by our Board of Directors:
1. Established an Executive Director Transition Team
2. Requested Letters of Intent from Leadership staff
3. Requested full applications
4. Conducted interviews
5. Board approval
6. Offer extended
EXECUTIVE TRANSITION PLANNING

- Hiring of new Executive Director announced to community, partners & staff
- Overlapping Executive Directors for two months
- Managing transition from peer to supervisor
- New Executive Director tasked with development of 5-year strategic plan
- Maintaining the history of the Agency
SUCCESSION PLANNING FOR ALL!

Planning ahead for:

- Other long-term staff retiring/leaving (especially managers and specialized individual contributors!)
- Knowledge & skill deficits
- Consistency in organizational processes & philosophies
- Retention of the “rock star” employees you’d hate to lose
SUCCESSION PLANNING FOR ALL!

The Rock Star Employee:

• Shows initiative, self-starter
• Commits to the mission and the work
• Commits to the team and leadership
• Demonstrates systems thinking
• Has a continuous improvement mindset (of self, others, and the work)
• Is willing to lead, and willing to follow
CRITICAL LEADERSHIP COMPETENCIES

Managing programs...

Area expertise/competence
Technological & financial management
Innovation & creativity
External awareness & partnering
Effective problem-solving & decision-making
Visionary & strategic thinking
Accountability & results orientation (ROMA)
Change management
Human capital management
  (staffing, task delegation, utilization & structure)
CRITICAL LEADERSHIP COMPETENCIES

Managing people...

Communication skills (oral, written, nonverbal)
Interpersonal skills
Conflict management
Social & emotional intelligence
Flexibility & open-mindedness
Resilience
Integrity & honesty
Commitment to development of self & others
Team building & support
Discipline (doing what needs to be done)
A LITTLE HISTORY...

• *Supervisor Development Training*
  • Problem-solving supervisory experience requirement for staff
  • Thoughtful scheduling based on programmatic limitations

• *Existing Supervisor Continuous Learning*
  • Mandatory supervisory trainings three times per year (rotating topic)
  • Recurring requests for particular management topics
## Supervisor Development Training (Level 1)

<table>
<thead>
<tr>
<th>Intended Audience:</th>
<th>Employees who are interested in becoming supervisors but lack the required experience and knowledge to supervise effectively</th>
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</thead>
<tbody>
<tr>
<td>Overall Objective:</td>
<td>Participants will receive high-level information on the roles and responsibilities of a supervisor at our Agency (<em>not just anywhere</em>)</td>
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### Supervisor Development Training (Level 1)

| Topics Covered:                          | Supervisory Standards & Roles                          |
|                                       | Workplace Boundaries & Balance                          |
|                                       | Basic Employment Law and Resources                       |
|                                       | Team Building                                            |
|                                       | Communication Skills for Supervisors                     |
|                                       | Conflict Management & Resolution                        |
|                                       | Recruitment Best Practices                               |
|                                       | Performance Management                                   |
|                                       | Professional Development                                |
|                                       | Discipline (Coaching & Counseling)                      |
**Supervisor Development Training (Level 2)**

<table>
<thead>
<tr>
<th>Intended Audience:</th>
<th>Employees have completed Supervisor Development Training Level 1 who would like more in-depth information and exposure to more complex supervisory techniques</th>
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</thead>
<tbody>
<tr>
<td>Overall Objective:</td>
<td>Participants will receive in-depth information on the basic supervisory topics covered in Level 1 as well as opportunities to practice skills learned in a safe learning environment</td>
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## Supervisor Development Training (Level 2)

### Topics Covered:
- Transitioning from Peer to Supervisor
- Approaches to Leadership & Supervision
- Building Trust in Working Relationships
- Creating a Motivational Climate
- Communicating with Assertiveness
- Identifying & Responding to Conflict
- Ethical Responsibilities of the Supervisor
- Giving Formal & Informal Feedback
- Coaching Skills for Supervisors
- Setting Clear Expectations
- Documentation Best Practices
- Legal Compliance in Hiring
- Behavioral Interviewing
- Cultural Awareness, Diversity, & Inclusion
# GIVE THEM THE SKILLS: TRAINING FOR TODAY

## Supervisor/Manager Skill Series

<table>
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<th>Employees currently responsible for direct supervision of at least one person</th>
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<td>Overall Objective:</td>
<td>Participants will receive in-depth information on management best practices and have the opportunity to troubleshoot and review real-life scenarios with peers in a safe place</td>
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### Topics Covered:

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<tr>
<td><strong>Team Dynamics &amp; Stages of Development</strong></td>
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<tr>
<td><strong>Developing your Personal Leadership Style</strong></td>
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<td><strong>Emotional Intelligence at Work</strong></td>
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<tr>
<td><strong>Delegation for Professional Development</strong></td>
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<tr>
<td><strong>Conducting Effective Feedback Meetings</strong></td>
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<tr>
<td><strong>Analyzing &amp; Addressing Performance Issues</strong></td>
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<tr>
<td><strong>Recruitment Best Practices</strong></td>
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<tr>
<td><strong>Managing Difficult Behaviors</strong></td>
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<tr>
<td><strong>Leading Through Change</strong></td>
</tr>
<tr>
<td><strong>Problem-Solving &amp; Decision-Making</strong></td>
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<tr>
<td><strong>Conflict Dynamics &amp; Management</strong></td>
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<tr>
<td><strong>Effective Meeting Management</strong></td>
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<td><strong>Appropriately Asserting Authority</strong></td>
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<td><strong>Relationship Management</strong></td>
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In four years...

88 graduates

25 promotions
STRUCTURING THE TRAINING

- Off site, no distractions!
- Consider the time & attention commitment
  - All-day sessions? Partial days?
  - Consecutive or non-consecutive?
- Consider the annual calendar
  - Time(s) of year when it is slower?
  - Multiple training dates to provide options/flexibility to staff
ADDRESSING ADULT LEARNING STYLES

- The key: **variety**!
  - Group Discussion
  - Individual Self-Reflection Activities
  - Group Activities
  - Video & Music
  - Games
  - Role Plays
  - Pre-Work *(not homework!)*
MEET SOME GRADUATES!

• Zoila Coppiano, Community Connect Coordinator
  • Hired as a Community Resource Advocate in fall 2014
  • Promoted to Housing Program Specialist fall 2016
  • Promoted to current supervisory role January 2018!

• Randall Olsen, Energy Conservation Manager
  • Hired into this role at the end of 2012
  • Brought over twenty years of weatherization experience, including management of his own weatherization business
THANK YOU FOR YOUR TIME!

Questions or thoughts? Feel free to contact us!

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<td>ph 503.726.0864</td>
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The Partnership Wants Your Feedback!

Please be sure to complete the evaluation for this session online, via the CAPCON18 Event App.