

Manage Succession Plans

PURPOSE

The purpose of this job aid is to assist **managers** in **establishing** and **viewing Succession Plans** for **approved positions** within their **Divisions and or Departments**.

Succession Planning is a process for identifying and developing internal employees with the potential to fill key positions in the College. **Succession Planning** increases the availability of experienced and capable employees that are prepared to assume these roles as they become available.

Taken narrowly, "**replacement planning**" for key roles is the heart of **succession planning**. Effective **succession** or **talent-pool management** builds a series of feeder groups up and down the entire leadership **pipeline** for possible progression.

Succession Planning focuses on identifying specific candidates for projected or vacant College **Administrator, PTS Management or PTS Non-management** positions. If you have any questions during the process, please contact [Employee Relations](#).

TASKS IN THIS JOB AID

[Locate the Manage Succession Plan Task](#)

[Set up a Succession Plan](#)

[Add Candidates to a Succession Plan and Evaluate Readiness](#)

[Manage and View Succession Plans by Position](#)

[Manage and View All Active Succession Plans](#)

[View the Talent Management Dashboard Function](#)

Locate the Manage Succession Plan Task

Step 1

To **establish, manage and view succession plans**, managers should locate the **“Talent”** worklet displayed on their **Home Page**.



NOTE:

If there is no **“Talent”** worklet on your **Home Page** > follow the **“Configure Worklets”** Workday Job Aid located at:

<https://broward.adobeconnect.com/p9n2ldxwvu9/> to add the **“Talent”** Worklet to your **Home Page**.

Step 2

Click on the **“Talent”** worklet.



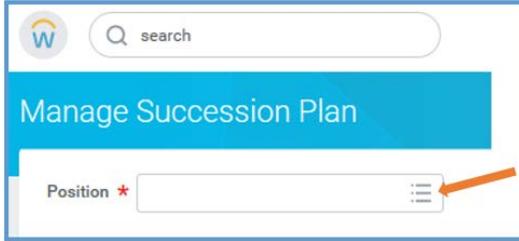
Step 3

Click on the **“Manage Succession Plan”** action tab.

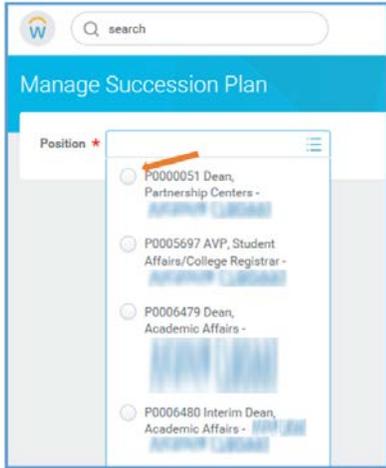


Locate the Manage Succession Plan Task

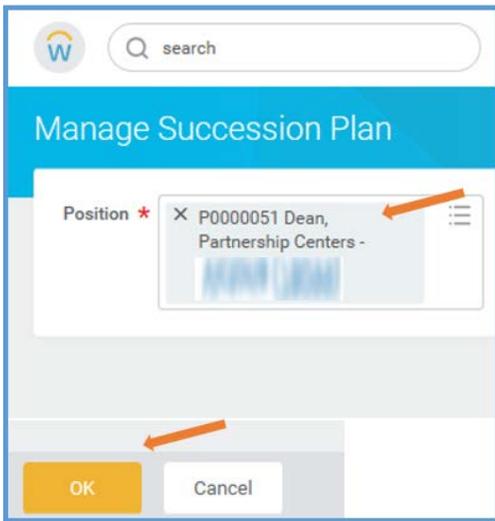
Step 4 Select a **"Position"** by clicking on the **drop-down** tool bar and display **approved succession plan positions**.



Step 5 Select an **approved succession plan position** by clicking on the bubble next to the **Position**.



Step 6 Selected **Position** will **self-populate** > click **OK**.



Set Up a Succession Plan

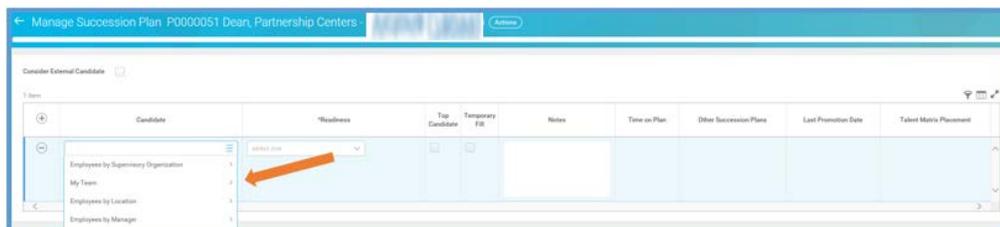
Managers can **Set Up a Succession Plan** by selecting **Candidates** and adding them to **approved succession plan positions**.



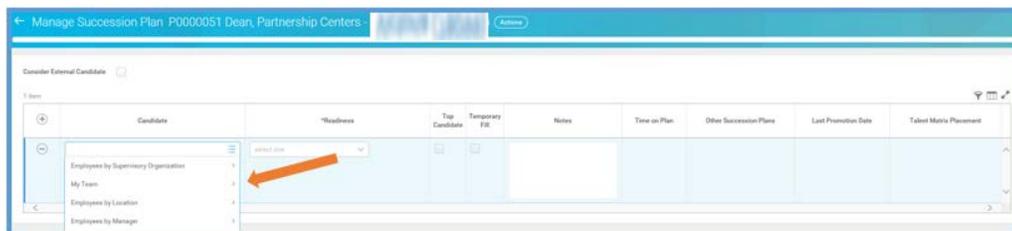
Step 1 Select a **"Candidate"** by clicking on the **drop-down** tool bar or **click** the **+** sign to "add" another employee and click on the **drop-down** tool bar.



NOTE: When you click on the **drop-down** tool bar, it will display several organizational choices used to narrow a **"Candidate"** search. Most choices for internal succession planning may be added from the Managers **"My Team"** or the **"Employees by Supervisory Organization"** selection.

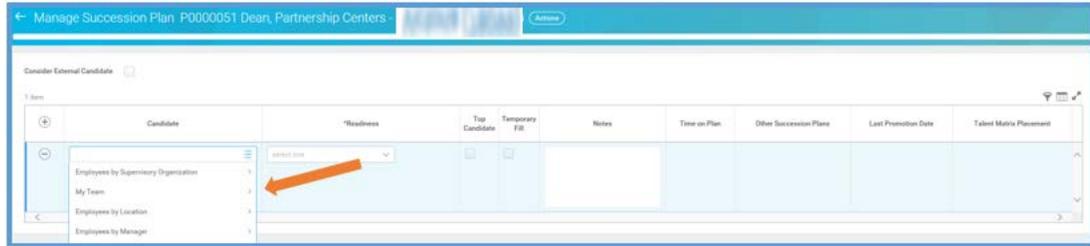


NOTE: You can choose the **Employees by Supervisory Organization, My Team, Employees by Location, or Employees by Manager** to add **"Candidates"**.

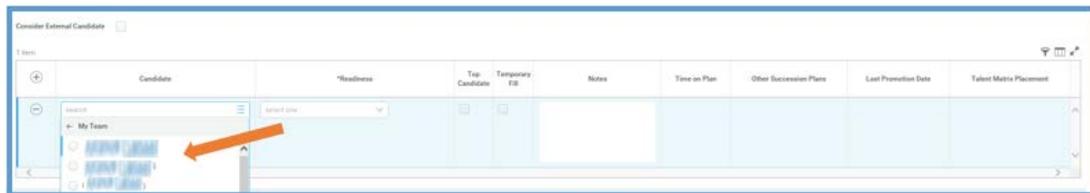


Add Candidates to a Succession Plan and Evaluate Readiness

Step 1 Click on the **drop-down** tool bar displaying several organizational choices used to narrow a **“Candidate”** search. Most choices for internal succession planning may be added from the Managers **“My Team”** or the **“Employees by Supervisory Organization”** selection.

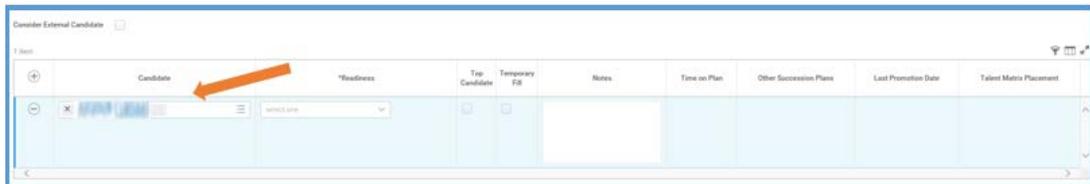


Step 2 Click on a **“Candidates”** name.

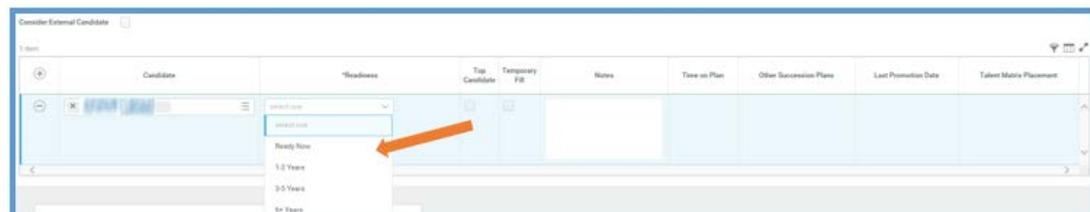


NOTE: You can only add one (1) **“Candidate”** at a time. After completing Steps 3 through 9 below for a current **“Candidate”** > **Add** another **“Candidate”** by following Steps 1 through 9 for additional **“Candidates”**.

Step 3 The **“Candidates”** name will self-populate.



Step 4 Evaluate a **“Candidates Readiness”** by clicking on the **Readiness Drop Down** tool bar displaying several **“Readiness”** conditions.



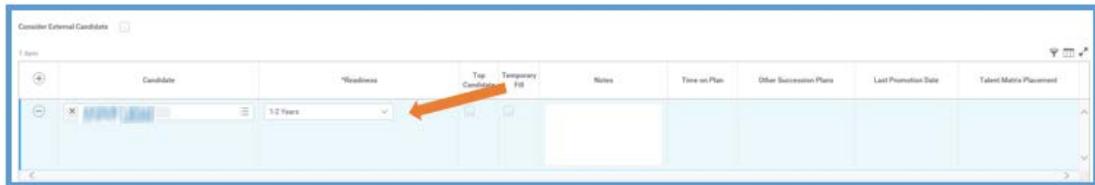
Add Candidates to a Succession Plan and Evaluate Readiness

NOTE: **“Readiness”** conditions should reflect the managers’ assessment of the **“Candidates”** ability to assume the responsibility of the incumbent’s position within a period of time.

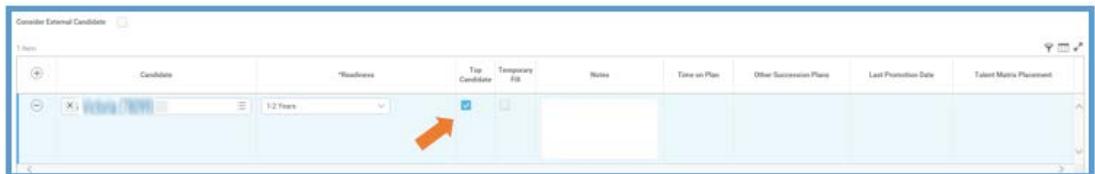
Level	Definition
Ready	Candidate is ready to assume the responsibility of the incumbent within one year.
1-2	Candidate is ready to assume the responsibility of the incumbent within 2 years.
3-5	Candidate is in a short-term development cycle - ready to assume the responsibility of the incumbent within 5 years.
6+ Years	Candidate is in a long-term development cycle - ready to assume the responsibility of the incumbent within 6+ years.

“Candidate” readiness assists in ensuring that the incumbents’ position has a fully developed **“succession pipeline”** which should reflect **“best qualified” (ready now)** and future talent **(over a period of time)**.

Step 5 Choose a **“Readiness”** condition.



Step 6 Select if the **“Candidate”** is a **“Top Candidate”** for the **approved succession plan position**, regardless of the **“Readiness”** condition. Managers’ can add **“Candidates”** to the **succession plan** regardless if the **“Top Candidate”** option is selected or not selected.

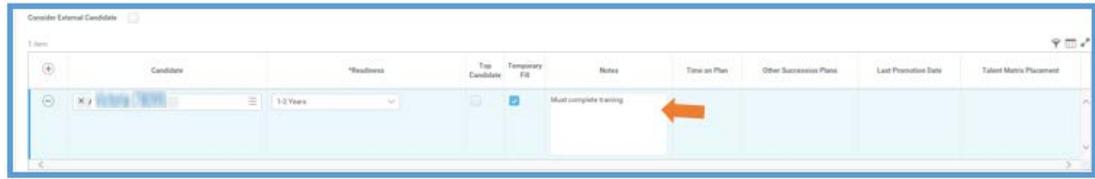


Step 7 Select if the **“Candidate”** can be a **“Temporary Fill”** for the **approved succession plan position**.



Add Candidates to a Succession Plan and Evaluate Readiness

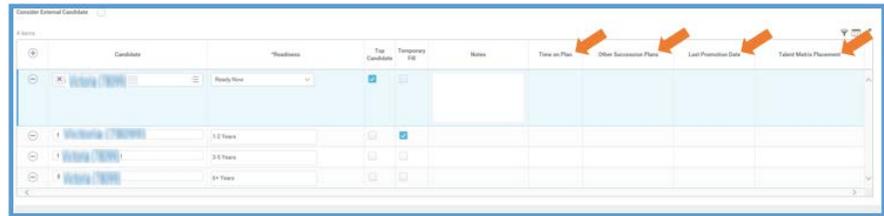
Step 8 If applicable, add **notes** to the **approved succession plan position**.



Step 9 The remaining fields, **“Time in Plan”**, **“Other Succession Plan”**, **“Last Promotion Date”**, and **“Talent Matrix Placement”** will populate once the **succession plan** is approved by the **“Talent Partners” (Human Resources & Equity Personnel)**.

View 9

View of a completed **Succession Plan** **prior** to submitting for **“Talent Partners”** approval of the **succession plan**.



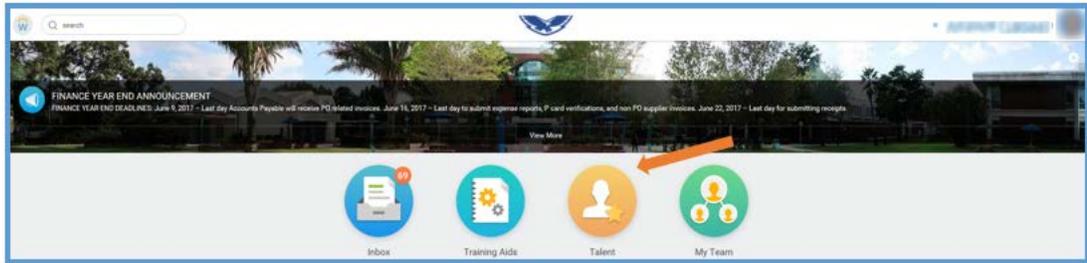
NOTE: Notice above in View 9 that the remaining fields **“Time in Plan”**, **“Other Succession Plan”**, **“Last Promotion Date”**, and **“Talent Matrix Placement”** **are not populated** until the **succession plan** is approved by the **“Talent Partners” (Human Resources & Equity Personnel)**.

Once you have added all of your personnel into the **succession plan**, click on **submit** to complete the task.

Submit

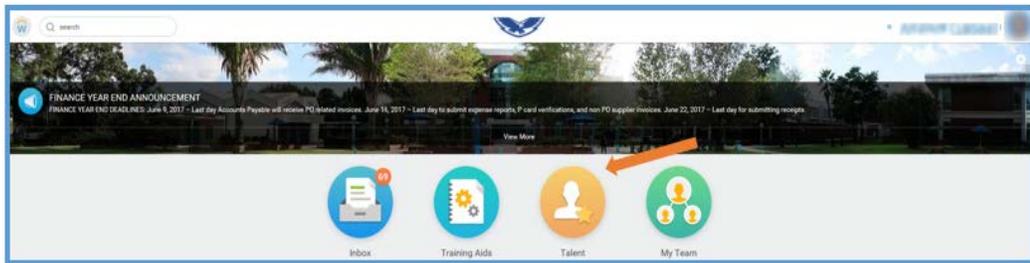
Manage and View Succession Plans by Position

Step 1 To **manage and view succession plans by positions**, managers should locate the **“Talent”** worklet displayed on their **Home Page**.

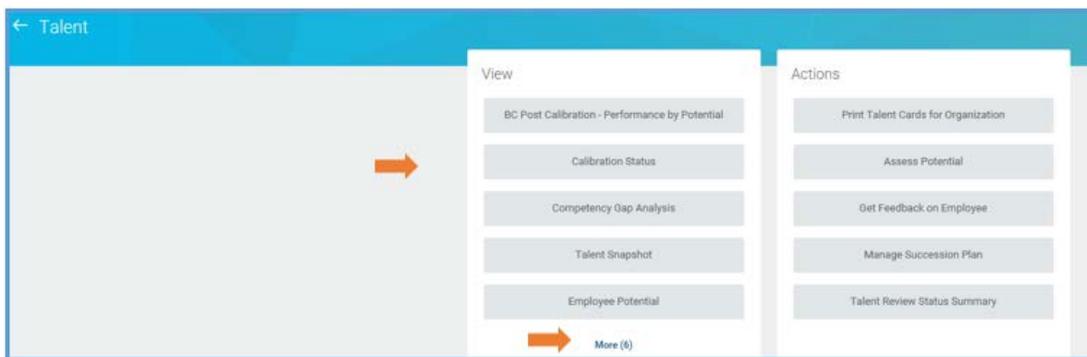


NOTE: If there is no **“Talent”** worklet on your **Home Page** > follow the **“Configure Worklets”** Workday Job Aid located at:
<https://broward.adobeconnect.com/p9n2ldxwvu9/> to add the **“Talent”** Worklet to your **Home Page**.

Step 2 Click on the **“Talent”** worklet.



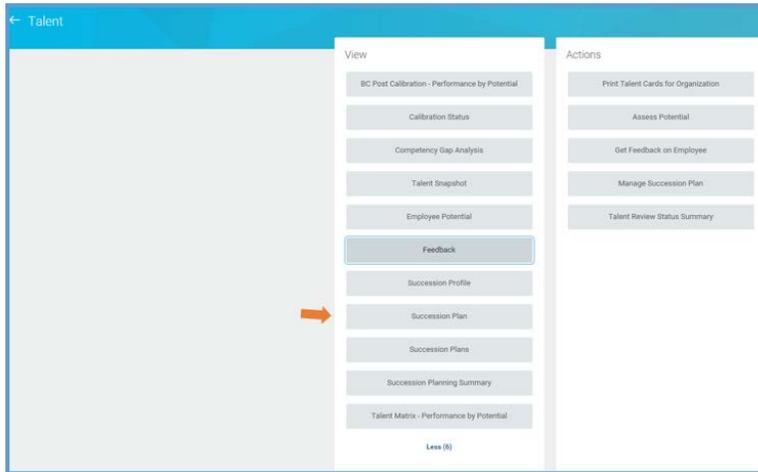
NOTE: Once you click on the **“Talent”** worklet you may have to **expand the view** to see additional items in your **“pick list”** by clicking on **“More”**.



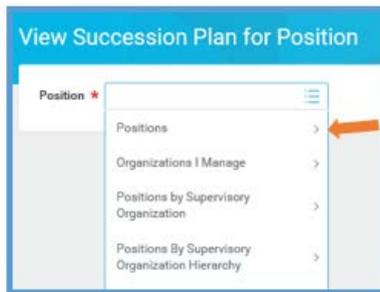
To **expand the view**, click on the **“More”** tab and additional items will appear in your **“pick list”**.

Manage and View Succession Plans by Position

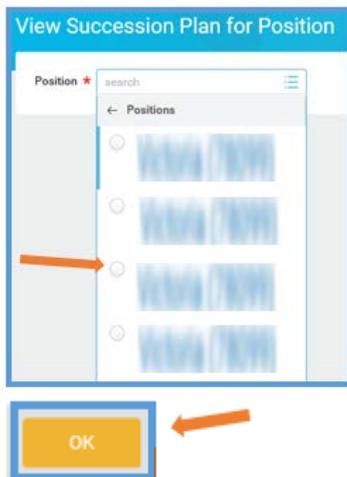
Step 3 From the **expanded view** select **“Succession Plan”** to view a **succession plan by position**.



Step 4 Click on the **drop-down** tool bar displaying several organizational choices used to narrow a **“position”** search. Most choices for internal succession planning may be viewed from the **“Positions”** selection.



Step 5 Select a **position** and click **OK**.



Manage and View Succession Plans by Position

NOTE: Managers view a position **Succession Plan** in a “compare employee” view.

	↓ Employee #1	↓ Employee #2	↓ Employee #3	↓ Employee #4
Talent				
Current Review Rating	8	7		9
Career Preference		Expand beyond role		Broaden
Potential	Correctly Placed	Correctly Placed		Correctly Placed
Retention	3-Low Risk	2-Medium Risk		2-Medium Risk
Loss Impact	Significant	Significant		Significant
Achievable Level	Up 1-2 Levels	Up 2-3 Levels		Up 1-2 Levels
Tenure				
Qualifications				
Succession				
Readiness	Ready Now	Ready Now	1-2 Years	3-5 Years
Notes			stfssdfstfssdfad	
Top Candidate	Yes	Yes	Yes	
Temporary Fill	Yes	Yes		

NOTE: There are four (4) compare employee data fields. **Talent, Tenure, Qualifications** and **Succession**.



NOTE: **Talent Data:**
 Current Review Rating
 Career Preference
 Potential
 Retention
 Loss Impact
 Achievable Level

Tenure Data:
 Current Job History

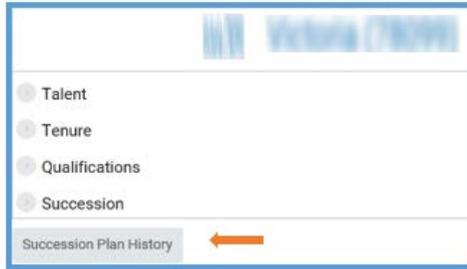
Qualifications Data:
 Competencies
 Certifications

Manage and View Succession Plans by Position

NOTE: Succession Data:

Readiness
Notes
Top Candidate
Temporary File

NOTE: Managers can click on the **“Succession Plan History”** tab at the bottom of the **“compare employee view”**



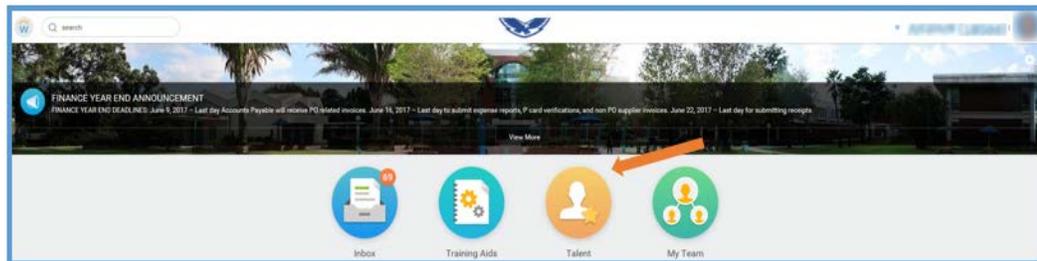
to **“download”** data to an excel spreadsheet or **filter** data.

A screenshot of a data table with a header row and several data rows. The table has columns for Succession Plan, Date and Time Initiated, Consider External Candidate, Incumbent, Succession Candidate, Top Candidate, Temporary Fill by Candidate, Readiness, Notes, and Initiating Action. An orange arrow points to a button labeled 'Excel Download or Filter Function' in the top right corner of the table area.

Succession Plan	Date and Time Initiated	Consider External Candidate	Incumbent	Candidates			Readiness	Notes	Initiating Action
				Succession Candidate	Top Candidate	Temporary Fill by Candidate			
	03/30/2018 10:45:44.060 AM				Yes	Yes	Ready Now		Manage Succession
					Yes		1-2 Years	sfdasdfsdfad	
							3-5 Years		
	03/30/2018 10:38:18.071 AM				Yes	Yes	Ready Now		Manage Succession
	03/29/2018 01:25:33.290 PM				Yes	Yes	Ready Now		Manage Succession

Manage and View All Active Succession Plans

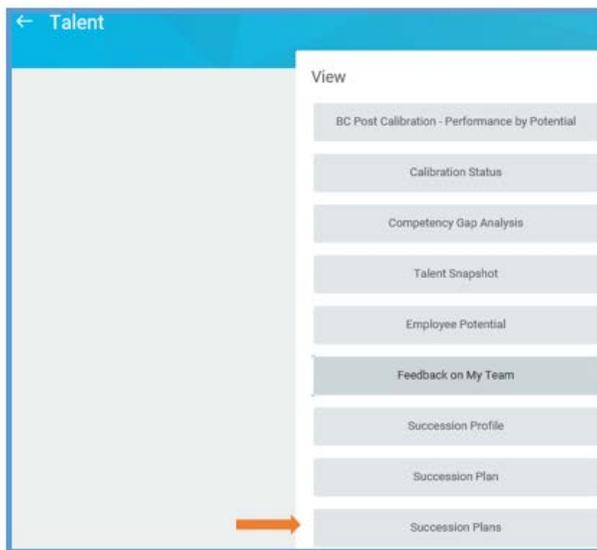
NOTE: Managers can **“manage and view all active succession plans”** using the **Succession Plans** tab found in the **“Talent”** Worklet.



Manage and View All Active Succession Plans

Step 1 Once you click on the **“Talent”** worklet you may have to **expand the view** to see additional items in your **“pick list”** by clicking on **“More”**.

From the **expanded view** select **“Succession Plans”** to view all **active succession plans**.



Step 2 The **“My Team’s Succession Plans”** data will appear.

Organization	Position	Incumbent	Retention	Succession Plan	Top Candidates	Candidates	Last Updated
Victoria (78099)	Victoria (78099)	Victoria (78099)	3-Low Risk	View Edit		4	03/30/2018
Victoria (78099)	Victoria (78099)	Victoria (78099)	2-Medium Risk	View Edit		2	03/30/2018
Victoria (78099)	Victoria (78099)	Victoria (78099)	3-Low Risk	View Edit		0	
Victoria (78099)	Victoria (78099)	Victoria (78099)	3-Low Risk	View Edit		0	
Victoria (78099)	Victoria (78099)	Victoria (78099)					
Victoria (78099)	Victoria (78099)	Victoria (78099)					

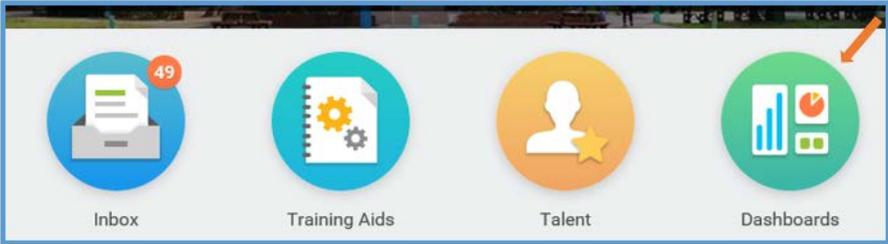
Managers can **“View”** or **“Edit”** active succession plans using this function.

If the manager selects **“View”** a **“compare employee”** view will appear as discussed in the above [Manage and View Succession Plans by Position](#).

If the manager selects **“Edit”** click this [“Add Candidates to a Succession Plan and Evaluate Readiness”](#) function.

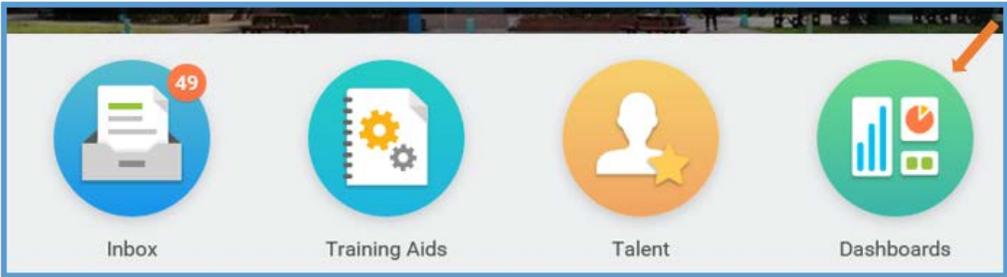
View the Talent Management Dashboard Function

Step 1 To **View the Talent Management Dashboard Function**, managers should locate the **“Dashboard”** worklet displayed on their **Home Page**.



NOTE: If there is no **“Dashboard”** worklet on your **Home Page** > follow the **“Configure Worklets”** Workday Job Aid located at:
<https://broward.adobeconnect.com/p9n2ldxwvu9/> to add the **“Dashboard”** Worklet to your **Home Page**.

Step 2 Click on the **“Dashboard”** worklet.



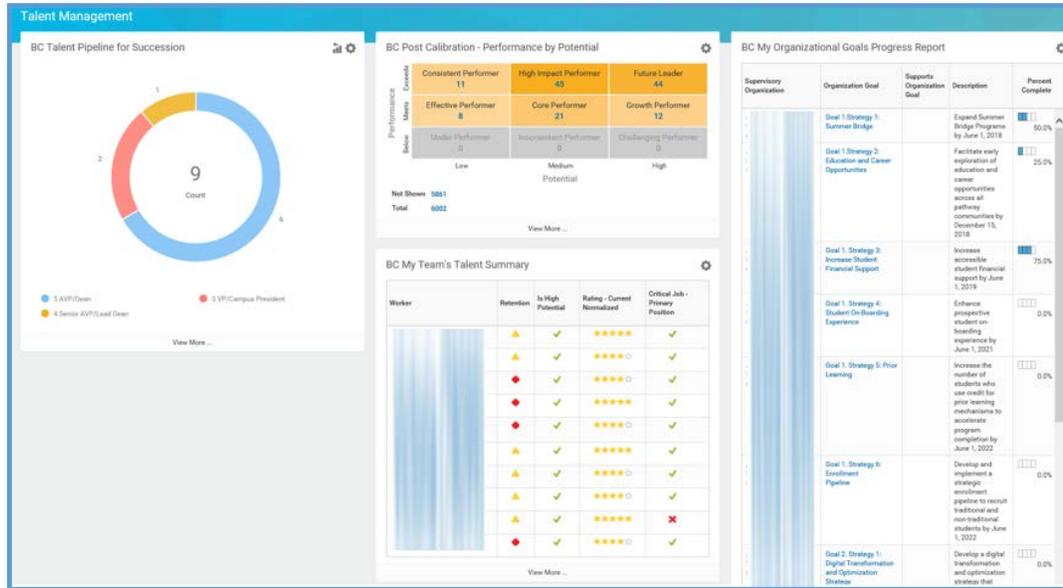
Step 3 Scroll down the **Dashboard List** and click on the **“Talent Management”** action tab.



View the Talent Management Dashboard Function

Step 4

A **Talent Management** dashboard will appear.



Note:

When **managers** first access the **"Talent Management"** dashboard, some dashboards may not be populated with current supervisory data.

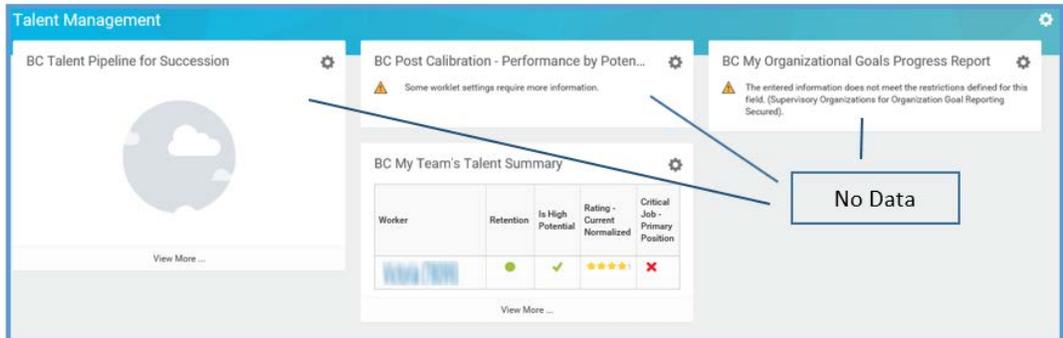
The current active **Talent Management** dashboards are:

View 1 - **BC Talent Pipeline for Succession**

View 2 - **BC Post Calibration – Performance by Potential**

View 3 - **BC My Organizational Goals Progress Report**

View 4 - **BC My Team's Talent Summary**



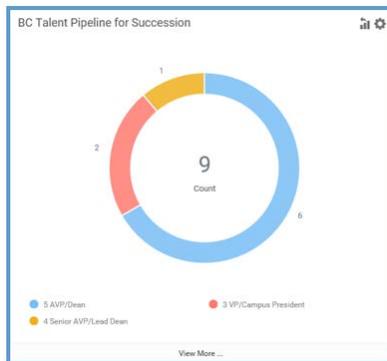
To populate the dashboards with data, follow the below steps.

View the Talent Management Dashboard Function

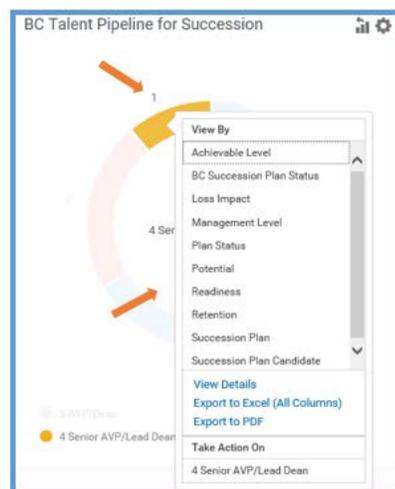
View 1 The **BC Talent Pipeline for Succession** dashboard will populate with data after successfully creating an approved succession plan. If authorized, click on the link [Set Up a Succession Plan](#) and follow the steps. View with **no data**:



Once succession plans are approved, the **BC Talent Pipeline for Succession** dashboard will populate with data and present a “pie” chart with **succession plan** data resembling the below dashboard dependent on a supervisory organization.

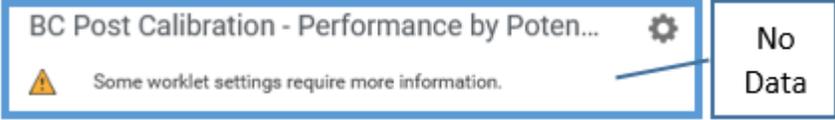


To view **BC Talent Pipeline for Succession** data, click on a **color** or a **Job Classification Level** and select a “View By” function.



View the Talent Management Dashboard Function

View 2 The **BC Post Calibration – Performance by Potential** dashboard will populate with data after successfully completing a **Talent Management Nbox Calibration Task**.



If an organization has completed a **Talent Management Nbox Calibration Task** and **no data exists** follow the below steps.

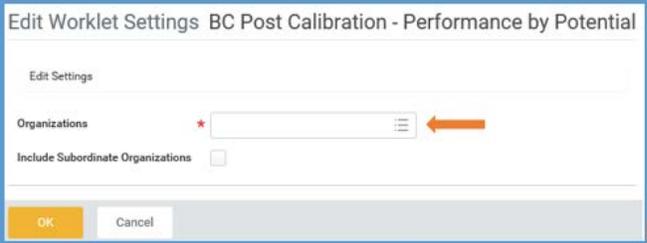
View 2a Click on the “**wheel**” symbol in the right-hand corner of the **BC Post Calibration – Performance by Potential** dashboard.



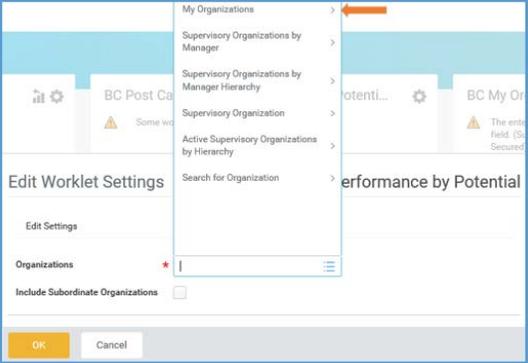
View 2b Click on “**Edit Settings**”.



View 2c View an **Organization** by clicking on the drop-down tab:



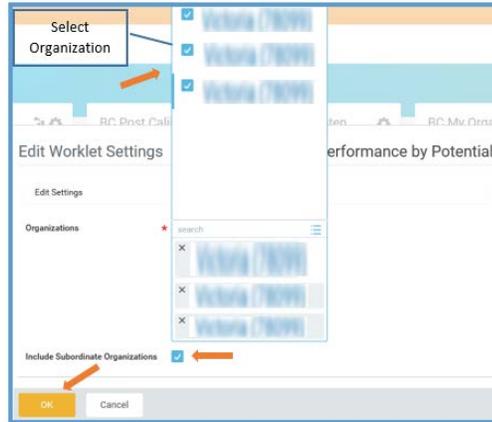
View 2d Click on “**My Organizations**”.




View the Talent Management Dashboard Function

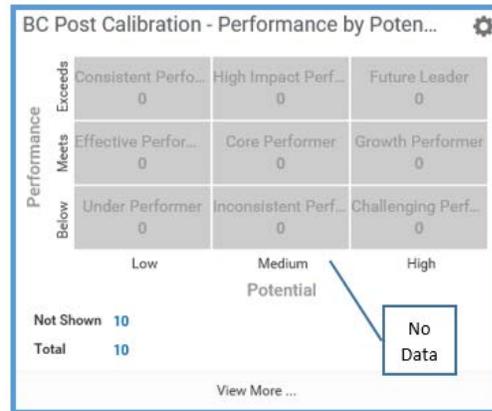
View 2e

Select one or more **Organizations** and select **“Include Subordinate Organizations”** and click **OK**.



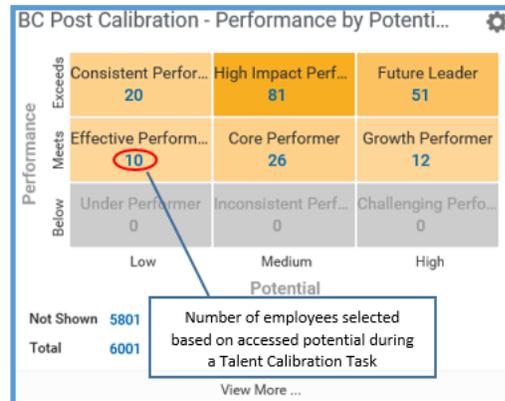
NOTE #1:

If an organization has **not completed** a **Talent Management Nbox Calibration Task** then no data will populate.



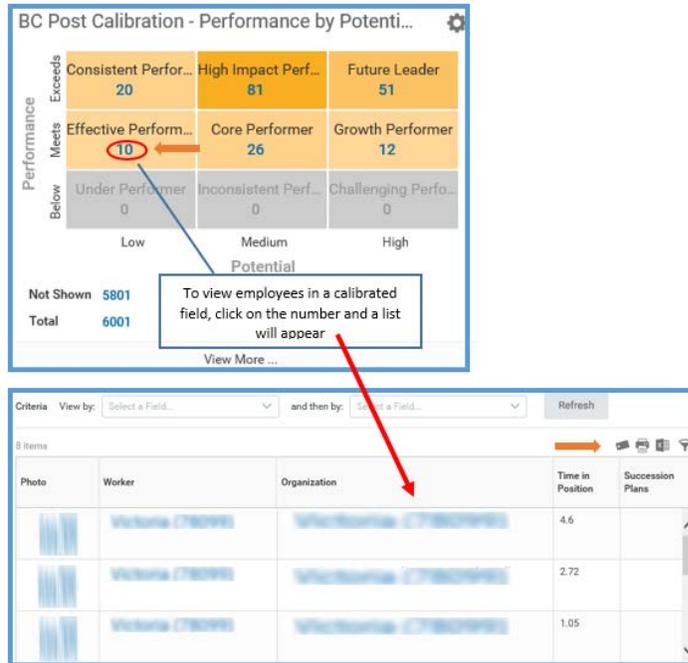
NOTE #2:

If an organization **has completed** a **Talent Management Nbox Calibration Task** then data will populate.



View the Talent Management Dashboard Function

NOTE #3: To **view employees** in a **calibrated field**, click on the number and a list will appear. Managers can **print**, **download** a roster in excel or **filter** the data.



View 3 The **BC My Organizational Goals Progress Report** dashboard is used by managers to manage **Organizational Goals** in support of strategic and developmental goals. To learn how to **Manage Organizational Goals** use the Workday Job Aid by clicking on the following link: <https://broward.adobeconnect.com/p8rivh4tgtc/>.



View the Talent Management Dashboard Function

View 3a

When viewing the **BC My Organizational Goals Progress Report** managers should make sure the current **“Goal Period”** is selected.

NOTE: Each year a “Goal Period” is added for the current Fiscal Year from July to June.

To view a current **“Goal Period”** click on the **“Wheel”** symbol.



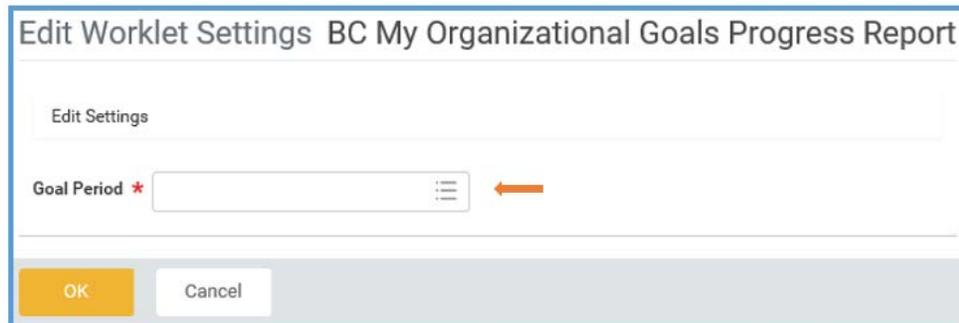
View 3b

Select **“Edit Settings”**.



View 3c

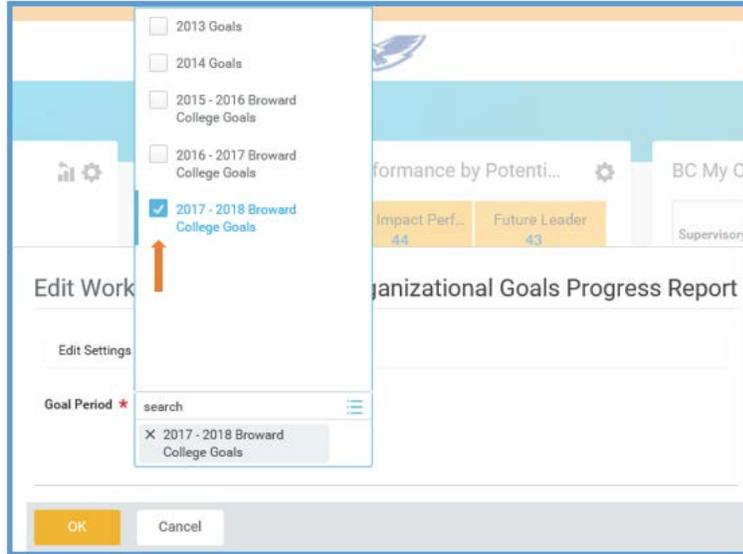
Click on the **“drop down”** tab.



View the Talent Management Dashboard Function

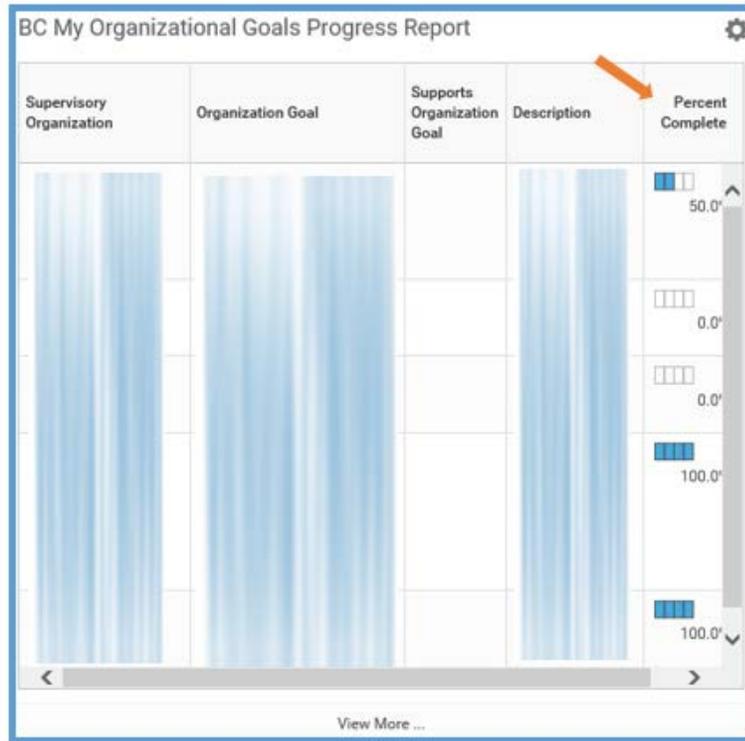
View 3d

Click on a **“Goal Period”** and click **“OK”**.



View 3e

The **BC My Organizational Goals Progress Report** will now reflect the current **Organizational Goals** for the **current fiscal year**.



View the Talent Management Dashboard Function

View 4

The **BC My Team's Talent Summary** dashboard is used by managers to review assessed potential. To assess an employee's potential, click on the following link: <https://broward.adobeconnect.com/p2flnr2cgpw/>.

Worker	Retention	Is High Potential	Rating - Current Normalized	Critical Job - Primary Position
[Blurred]	▲	✓	★★★★★	✓
[Blurred]	▲	✓	★★★★★	✓
[Blurred]	◆	✓	★★★★★	✓
[Blurred]	◆	✓	★★★★★	✓
[Blurred]	◆	✓	★★★★★	✓

View More ... ←

To review **additional fields**, **download data to excel**, **filter** or **hide fields**, click on the **“View More”** tab.

An expanded **“view”** will appear.

Worker	Photo	Job Profile	Location	#1 Retention	#2 Is High Potential	#3 Is Top Performer	#4 Rating - Current Normalized	#5 Achievable Level	#6 Difficulty to Fill - Primary Position	#7 Critical Job - Primary Position
Cayre, Michael D (29445)		Executive Director, Workforce Education & Economic Development	Wills Holcombe Center	◆	✓	✓	★★★★★	Up 1-2 Levels	◆	✓
DeSantis, Maritana P. (31626)		Campus President & VP, Student Services	Central Campus	◆	✓	✓	★★★★★	Up 1-2 Levels	◆	✓
Dornack, John M (33900)		Vice President, Operations	Cypress Creek Administrative Center	▲	✓	✓	★★★★★	Up 1-2 Levels	◆	✓
Edell, Denise K (3117)		Executive Director, Human Resources & Equity	Cypress Creek Administrative Center	▲	✓	✓	★★★★★	Up 1-0 Levels	◆	✓
Garcia, Roberto (37314)		Campus President	South Campus	▲	✓	✓	★★★★★	Up 1-2 Levels	◆	✓
Illaw, Kandice (37912)		District Director, Institutional Planning and Effectiveness	Cypress Creek Administrative Center	▲	✓	✓	★★★★★	Up 1-2 Levels		✗
North, James (20580)		Chief Financial Officer	Cypress Creek Administrative Center	◆	✓	✓	★★★★★	Up 1-2 Levels	◆	✓
O'Brien, Jean Veronica (3658)		Senior Executive Assistant	Cypress Creek Administrative Center	▲	✓	✓	★★★★★	Up 2-3 Levels		✗
Pelley, Sandra (39630)		Executive Assistant	Cypress Creek Administrative Center		✓					✗
Phoenix, Ava R (1811)		Campus President and VP, Academic Affairs	North Campus	▲	✓	✓	★★★★★	Up 1-2 Levels	◆	✓

NOTE:

There are **seven (7)** talent summary columns. **1) Retention, 2) Is High Potential, 3) Is Top Performer, 4) Rating – Current Normalized, 5) Achievable Level, 6) Difficulty to Fill – Primary Position, and 7) Critical Job – Primary Position**

Available data is represented by **color, symbols, and words**. See **View 4a** below for an explanation of the represented data.

View the Talent Management Dashboard Function

View 4a

Glossary: To view a reason, **hover your mouse icon** over the symbol and an explanation will appear.

1) Retention – The risk of an employee leaving the College.

- Green Circle  – This worker has **low retention risk** - An employee who would prefer to remain in the Organization even if a comparable opportunity arises. **Not likely to leave in the next five (5) years.**
- Yellow Triangle  – This worker has a **medium retention risk** – possible action needed - An employee who demonstrates the desire not to stay with the organization if a comparable opportunity may arise. **Not likely to leave in the next two (2) years.**
- Red Diamond  - This worker has a **high retention risk** – immediate action needed - An employee who has demonstrated their desire to leave the organization to advance their careers. **Likely to leave within the next (2) years.**

2) High Potential – An employee who is assessed as having “High Potential”.

- A Green Check Mark  designates an employee who has been assessed as having “High Potential”.

3) Is Top Performer – An employee who received an overall rating of a nine (9) or a ten (10) on their latest Performance Review.

- A Green Check Mark  designates a “Top Performer”.

4) Rating – Current Normalized – The latest Overall Performance Review Rating.

- Represented by Yellow Stars  .
- Each Yellow Star represents 2 points of the 10-point overall performance review rating.
- i.e. – An employee who received an **eight (8)** on their overall performance review rating would be represented by four (4) Yellow Stars – two (2) points per star **times** four (4) stars **equals** eight (8) points.



View the Talent Management Dashboard Function

View 4a

5) Achievable Level – An employee’s ability to advance in job classifications related to their **current position** or **qualifications**.

- **Up 1 – 2 Levels** – Employee has shown the ability to move up 1 -2 organizational levels within the College.
- **Up 2 – 3 Levels** – Employee has shown the ability to move up 2 -3 organizational levels within the College.
- **Up 3+ Levels** – Employee has shown the ability to move up 3 or more organizational levels within the College.

6) Difficulty to Fill – Primary Position – A position identified as potentially having limited internal and external candidates possessing the necessary competencies, skills, knowledge and abilities (SKA’s) required to **“Fill”** the Primary Position.

- A Red Diamond ◆ designates a **“Difficulty to Fill – Primary Position”**.

7) Critical Job – Primary Position – A position identified as being **“critical”** to the operation of the College.

- Green Check Mark ✔ designates a **“Critical Job – Primary Position”** flagged as **critical** to the organization.
- A Red ✘ designates a worker’s job that **has not been** flagged as **critical** to the organization.

Manager’s may request a review of the **“Critical Job – Primary Position”** criteria by contacting [Employee Relations](#).

← BC My Team's Talent Summary (Active)				#1	#2	#3	#4	#5	#6	#7
Worker	Photo	Job Profile	Location	Retention	In High Potential	In Top Performer	Rating - Current Normalized	Achievable Level	Difficulty to Fill - Primary Position	Critical Job - Primary Position
Coppe, Michael S (26642)		Executive Director, Workforce Education & Economic Development	Wells Helmsboro Center	◆	✔	✔	★★★★★	Up 1-2 Levels	◆	✔
DeLuca, Marilena P. (21729)		Campus President & VP, Student Services	Central Campus	◆	✔	✔	★★★★☆	Up 1-2 Levels	◆	✔
Danmark, John M (21993)		Vice President, Operations	Cypress Creek Administrative Center	▲	✔	✔	★★★★★	Up 1-2 Levels	◆	✔
Edell, Denise K (2172)		Executive Director, Human Resources & Equity	Cypress Creek Administrative Center	▲	✔	✔	★★★★☆	Up 1-0 Levels	◆	✔
Garza, Yolanda (21714)		Campus President	South Campus	▲	✔	✔	★★★★☆	Up 1-2 Levels	◆	✔
Gilman, Kandace (21912)		Director, Director, Institutional Planning and Effectiveness	Cypress Creek Administrative Center	▲	✔	✔	★★★★★	Up 1-2 Levels		✘
Huff, Jayson (20980)		Chief Financial Officer	Cypress Creek Administrative Center	◆	✔	✔	★★★★☆	Up 1-0 Levels	◆	✔
O'Brien, Jean Veronica (21638)		Senior Executive Assistant	Cypress Creek Administrative Center	▲	✔	✔	★★★★★	Up 2-0 Levels		✘
Pelley, Sandra (21622)		Executive Assistant	Cypress Creek Administrative Center	▲	✔					✘
Phelan, Ann R (1811)		Campus President and VP, Academic Affairs	North Campus	▲	✔	✔	★★★★★	Up 1-0 Levels	◆	✔