

Succession Planning Policy		No. 55
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Introduction

Succession planning can be broadly defined as identifying future potential leaders to fill key positions. It is 'a process by which one or more successors are identified for key posts (or groups of similar key posts) and career moves and/or development activities are planned for these successors' (CIPD 2008).

Talent 'consists of those individuals who can make a difference to organisational performance, either through their immediate contribution or in the longer-term by demonstrating the highest levels of potential' (CIPD 2008).

Talent and leadership development is a key part of workforce and people development. Loretto Housing Association and Loretto Care need to ensure that they are developing and utilising leadership and specialist talent, and ensuring a 'pipeline' to succession to key posts.

A framework needs to be in place to identify and develop individuals with the talent and abilities to undertake these roles in the future. This will include identifying staff that are currently employed and interested in developing their careers further within the Organisation.

The Organisation recognises the importance of retaining a balance between retention of skills and knowledge and the need to bring in fresh skills and ideas.

Loretto is committed to equal opportunities and all processes within the Succession Planning Policy will ensure that employees are not discriminated against on the basis of race, ethnicity, gender, sexual orientation, age, religious belief, disability or membership of a trade union.

Aim of the Policy

The aim of the policy is to support the development of individuals to help them identify areas where they can improve their skills and add further depth to their Personal Development and Career Plan. It also allows the organisation to identify people for development activity that best fits their needs and potential and to help secure longer term business continuity.

The purpose of the policy is to:

- provide Loretto with a process to manage succession planning to effectively fill key positions in the organisation.

- make the best use of internal staffing resources and talent by “growing our own” where possible.
- provide a fair and consistent framework for identifying individuals with the potential to develop competencies for senior positions within Loretto Housing Association and Loretto Care provide appropriate development opportunities to enable staff with potential to develop their skills to enable them to apply for key positions
- provide a stronger platform to support aspiring staff and to increase diversity.

Principles of Succession Planning

- Loretto are committed to develop the potential of all staff at all levels. All staff will be valued and supported in continuing to develop. The Human Resources and Learning and Development policies and processes are key enablers to deliver this commitment. Processes will be open and transparent
- Selection will be based on objective assessment and analysis of the skills of individuals with the potential to progress to senior positions to ensure confidence in the scheme and use the widest range of talent in the organisation.
- There is a need to focus on succession planning for key roles which are particularly critical to the success of the organisations, or that have proved difficult to recruit.
- There is recognition that upwards progression is not what all staff may want and that some role stability within the organisation is very valuable. Through the Appraisal and Performance processes staff will be encouraged and supported to develop their skills in existing or horizontal moves / roles. This will be reinforced by the need for all staff to continue to reflect and learn.
- It is a key role of all managers, and particularly senior managers to stimulate, spot, nurture and develop talent and staff aspiring to gain promotion.

Process

All staff will be invited to take part in the succession planning process, identifying their wish to pursue promoted posts or alternative experiences and participation is purely voluntary. For all staff:

- Discussions and assessments will take place through the Appraisal process
- There is an expectation that all statutory and mandatory training and core skills will be up to date
- The Appraisal process will guide and support the formal talent and succession planning process

- Individual Staff members will work with line managers to devise goals and development opportunities to help them progress their talent and succession planning process

The annual Training and Learning Needs Analysis in conjunction with the group wide Learning Zone available through Holmes will enable managers to nominate staff to formally participate in structured learning and support including access to:

A coach or mentor – see the Organisation’s Mentor Policy

- Project/subgroup work and on the job training at a more senior level when opportunities arise
- Relevant development programmes
- Apply for acting up opportunities and specialisms

Line Managers will independently assess the individual against the job requirements and they will both discuss their respective assessments. This will be agreed and finalised through the staff development and appraisal processes.

Line Managers will communicate openly with staff regarding their readiness potential including whether they are:

1. Ready to apply for a senior post now
2. Likely to be ready in 12-18 months
3. Likely to need a lateral move and / or training and development before being ready
4. Not suited to a more senior post

Development Programmes

Potential support and development opportunities may include any of the following:

- Opportunities to work at a higher level to cover vacancies while a substantive appointment is made – acting up
- Internal Transfers to gain additional skills and experience
- In-house Leadership Development Training
- Mentoring / coaching / shadowing and career advice
- External courses
- Step into Leadership
- Development opportunities – secondments/project work/subgroups.
- Further review via the Appraisal and Learning and Development processes
- Experience of panel interviews
- My Contribution 360-degree feedback

- Structured Learning and Development programme
- Secondments and short term project working

The most beneficial input is development experience, with staff having exposure to line management opportunities or offered alternative work that broadens their perspective and develops their strategic and wider level thinking.

Roles and Accountabilities

Individuals

The individual member of staff accepts personal and professional accountability for:

- Their own career and for the career paths they can influence
- Taking up the training and development opportunities provided to them
- Actively engaging in the Appraisal and Learning and Development process, reflective practice and career planning

Line Managers

Line Managers will support staff and implement the succession planning process

Senior Managers and the Management Committees

Senior Managers and the Loretto Board will ensure the succession planning process is embedded through the organisation

Senior Managers and the Loretto Board will support senior management development opportunities and offer feedback on performance.