



CALAFCO 2019 Staff Workshop Succession Planning: Is your LAFCO prepared for the Silver Tsunami?

Checklist for Successful Succession Planning

Pat McCormick, Executive Officer
Santa Cruz LAFCO

1 - 3 Years Prior to Leaving

- Update policies
- MSR determinations – document to-do tasks for affected agencies and LAFCO for next round
- Cross train staff
- If possible, avoid LAFCO staff members retiring close to one another
- Protect LAFCO staff perks
- Don't kick the can with difficult people/situations

Last Year Before Leaving

- Document institutional memory
- Hiring process to be done by LAFCO staff, county, or human resources consultant
- Paper and electronic files in order
- Complete major projects
- Give county, city, and district staffs an opportunity to request exit training by outgoing LAFCO staffer
- Budget for turnover

Transition Period

- Give remaining staff input into new employee selection process
- Upstaffing and overlap of outgoing and incoming employees, if time and budget permit
- Document hiring process so easier the next time
- To-learn list for new employee
- Introduce new employee to politicians and key civil servants