

### 3 YEARS TO TAKEOVER: Preparing for the Transition of Leadership (2008)

This forum examined the pending transition of leadership from the *Baby Boomer* generation, who begin turning 65 in 2010, to the upcoming leadership in our community in the areas of business, government and non-profit organizations. It explored succession planning options, identified what's available and determined what's still needed.

## RESULTS

### CONCLUSIONS

#### Local organizations, including for profit, nonprofit and government institutions need:

- greater awareness as to the urgency and value of succession planning preparations;
- improved educational opportunities (trainings and workshops) on succession planning;
- diversity in the groups addressing succession planning. Avoid being tied to tradition. It is not only for upper leadership;
- processes for intergenerational exchange of knowledge beyond the basic organizational information;
- long term, short term and immediate goals for succession planning; and
- commitment to implementation of succession strategies including strong leadership and urgent priorities.

#### Upcoming leadership need:

- continuing education to prepare them for succession; and
- a creative approach to work with outgoing Baby Boomer mentors in order to prepare for incoming leadership.

**Incoming generations need to lead on this issue.**

### ACTION PLAN

- To seek a proclamation from the Mayor of the City of Jacksonville to raise awareness of the value and urgency of succession planning for our community.
- To create a toolkit (information manual) on the basics of strategic planning and its importance for our community's future. It will include the ideas heard of how individuals can best prepare themselves for leadership opportunities.
- To develop a plan to launch the results of the succession planning toolkit.
- To use the media and other organizations to create awareness for the toolkit and the importance of beginning to plan now.
- To create buy-in for the succession planning toolkit from the President of the Jacksonville Regional Chamber of Commerce and resource speakers.
- To partner with existing organizations such as the Jacksonville Regional Chamber of Commerce, Young Professionals Alliance, local funders of nonprofit organizations and others to share the lessons learned and toolkit results.

*Thanks to Fidelity Investments for supporting this Forum!*

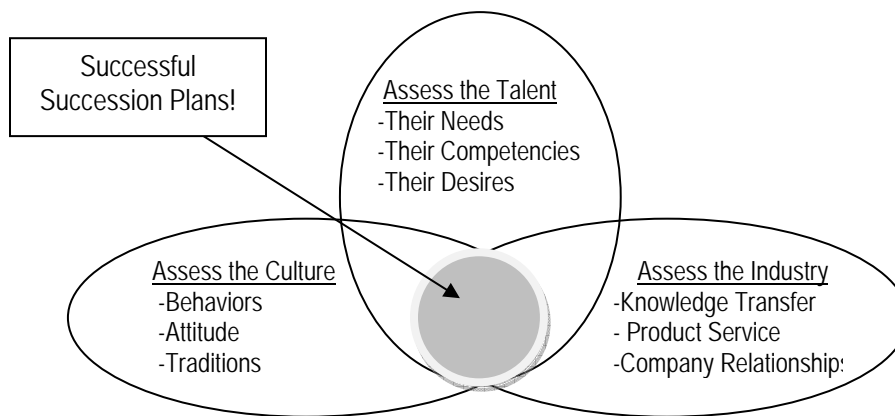
## KEY FINDINGS

### **Organizations:**

- There is a need for more urgency in business, government and nonprofit organizations to begin succession planning because it takes time to plan (anywhere from 5-15 years). The age wave of the Baby Boomers begins in two years and will last for the next eighteen.
- The variety of succession planning needs differ between small and large organizations. Corporations must allow themselves the resources and time to prepare their strategies. Small companies may lack resources to immediately address the issue easily.
- The three main areas of succession planning are to assess each organization's: talent [competencies, needs and desires of employees] knowledge transfer [industry, relationships and products], culture [organizationally, leadership style, and the organizations attitudes, behaviors, and traditions].
- The intergenerational workplace tension will need to be addressed. Gen X and Gen Y have multiple job changes versus Baby Boomers who stay with a company until retirement.
- There is a need to redefine the terms *dues*, *retirement*, *work*, *recruiting* and *retention*. What system will replace seniority for leadership advancement?
- Jacksonville had a negative population growth rate of 5% in the 24 to 34 age range.
- Technology has changed the way work is accomplished; you don't necessarily need to be in the office.

### **Individuals:**

- Individuals wanting to lead will need to prepare themselves for the transition.
- They need to show ambition and drive to take the lead.
- The path of employee from industry to retirement is being redefined as many corporate folks are retiring to the non-profit sector and transferring their skill sets.



### **Community Resources:**

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Rick Mullaney, City of Jacksonville  
Jennifer MacPhee, Jacksonville Regional Chamber of Commerce  
Ron Hetrick, Aerotek, Inc.  
Kathy Kanter, Kelly Services, Inc.  
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