

From Vacancy to Vision: Proactive Succession Planning for Local Government

WEDNESDAY, JULY 30, 2025 | 11 AM – 12:30 PM



THANKS FOR
JOINING US
TODAY!

Host & Moderator

MORGAN BELDEN
Program Manager
Institute for Local Government





WEBINAR OVERVIEW

Welcome & Introductions

Presentations & Discussion on Proactive Succession Planning:

- ◉ **Frank Benest** – International City/County Management Association (ICMA)
 - ◉ **Kaitlyn Montez** – City of West Sacramento
 - ◉ **Lisa Yapching** – County of San Mateo
-

Audience Q&A

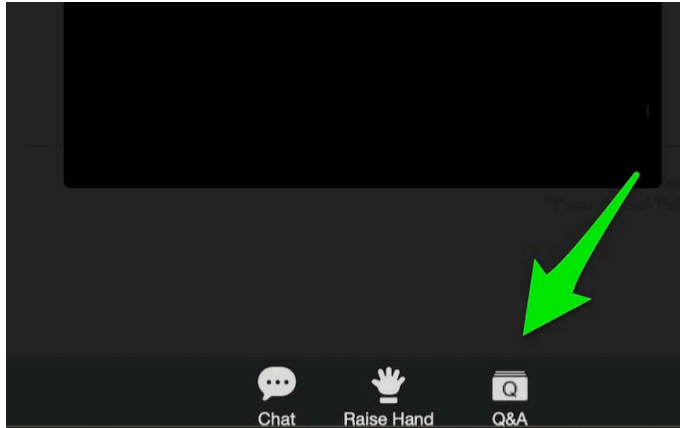
Wrap Up & Adjourn

We welcome your written questions and comments in Zoom's Q&A feature throughout the webinar!



TECH OVERVIEW & HOUSEKEEPING

- All webinar participants will be on **MUTE** for the duration of the event.
- Please type any questions for into the **Q&A BOX** at any time during the session.



- A recording of the session will be available shortly after the webinar.



Erica Manuel

*CEO & Executive Director
Institute for Local Government*





ABOUT THE INSTITUTE FOR LOCAL GOVERNMENT (ILG)



NON-PROFIT, NON-PARTISAN AND HERE TO HELP

- The Institute for Local Government is the non-profit training and education affiliate of three statewide local government associations
- Together with our affiliates, we serve over 2,500 local agencies – cities, towns, counties, and special districts
- We provide practical and easy-to-use resources so local agencies can effectively implement policies on the ground



**California Special
Districts Association**
Districts Stronger Together



ILG'S PROGRAMS AND SERVICES

Program Areas

Leadership & Governance

Workforce Development & Civics Education

Public Engagement

Sustainable & Resilient Communities

Our mission is to help local government leaders **navigate complexity, increase capacity & build trust** in their communities.



Services

Education & Training

Technical Assistance

Capacity Building

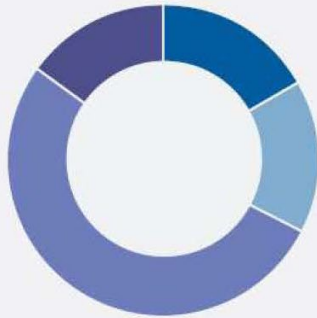
Convening

SETTING THE STAGE



RETIREMENT WAVE CONTINUES

Figure 13 **How would you characterize the impact on your government of the departure of retirement-age baby boomer employees from the workforce?** (n = 211)



- 17% The largest anticipated number of potential retirements has already taken place
- 16% The largest anticipated number of potential retirements is taking place right now
- 53% The largest anticipated number of potential retirements will take place over the next few years
- 15% No significant wave of retirements has happened or is anticipated over the next few years

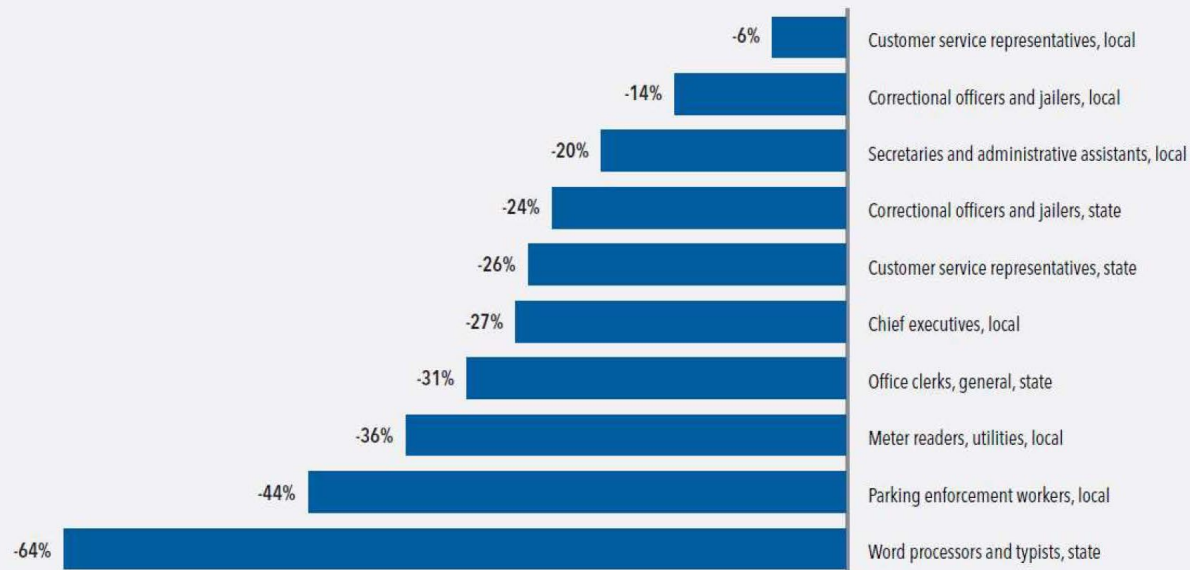
53%

expect the largest potential retirements to take place over the next few years

DESPITE INFLATION & BUDGET, GROWTH PROJECTED

2021-2031

Figure 30 Projected state and local employment decreases (2016-2031), select occupations



+1.4%

*local government labor
market growth*

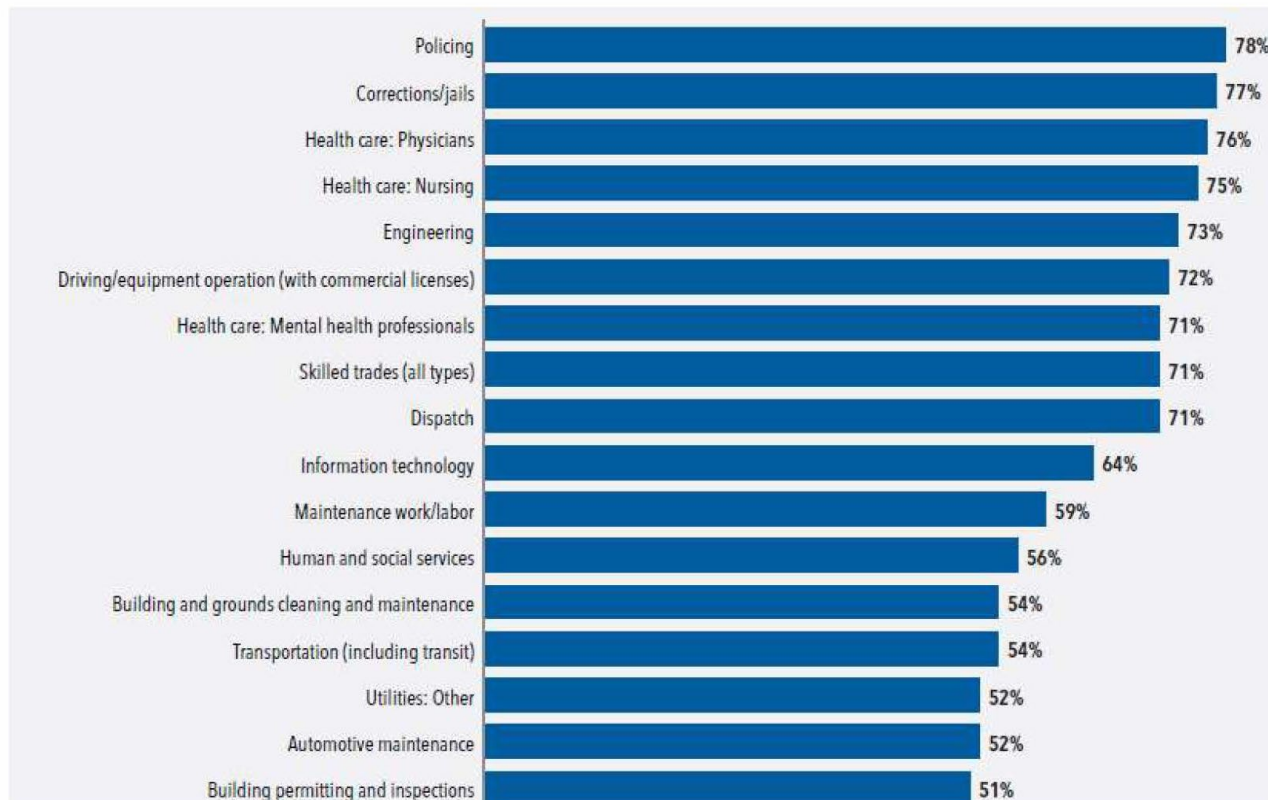
-6%

*State government labor
market growth*

Occupational demand will change over time, upskilling and reskilling will be required.

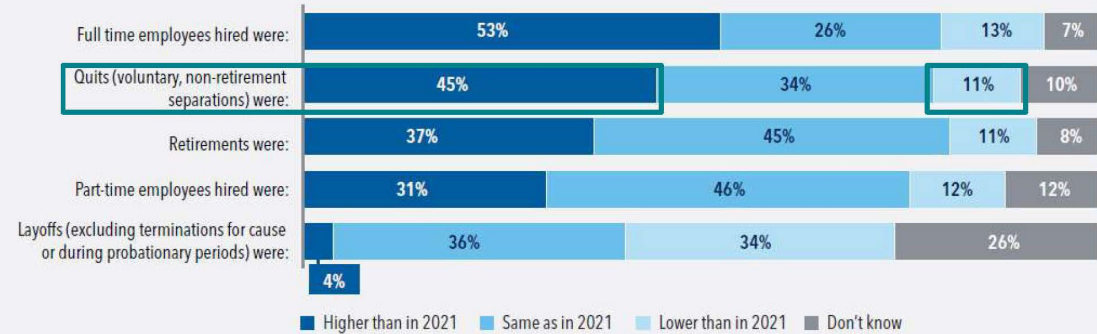
VACANCIES CONTINUE TO RISE

*Contributed by
hard-to-fill occupations
& retirements*



INCREASING RESIGNATIONS AND SEPARATIONS

Figure 4 Regarding changes in the size of your government's workforce in the past year... (n = 245)



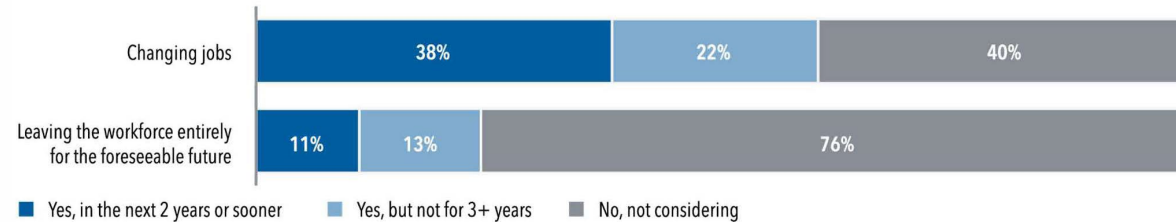
45%

saw an increase in voluntary quitting

GENERATIONAL SHIFTS WILL IMPACT RETENTION LEVELS

6 in 10 workers age 35 and under are considering a job change in the near future

Figure 31 **Job Changes You Are Considering in the Near Future**



BRIDGING THE TALENT GAP IN LOCAL GOVERNMENT

The Succession Challenge

- Rising retirements & institutional knowledge loss
- Limited leadership pipelines
- Recruitment & retention challenges
- Overburdened staff with few upskilling pathways

Local Gov't Apprenticeship Opportunity

Registered Apprenticeships offer:

- On-the-job training + targeted instruction
- Internal talent development & upskilling
- Early-career recruitment
- Higher retention + faster time-to-fill





TODAY'S PANELISTS



FRANK BENEST
Senior Advisor for Next
Generation Initiatives,
**International City/County
Management
Association (ICMA)**



KAITLYN MONTEZ
Human Resources
Supervisor,
**City of West
Sacramento**



LISA YAPCHING
HR Division Manager -
Compensation and
Talent Acquisition,
County of San Mateo

From Vacancy to Vision --Proactive Succession Planning in Local Govt--

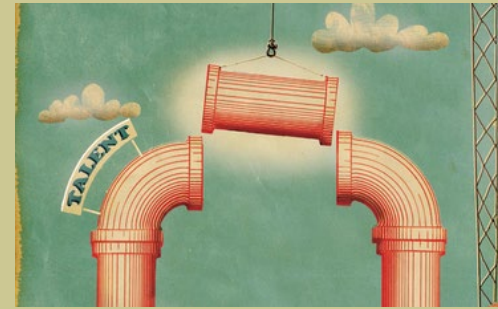


Polling Question

What are the big talent challenges confounding your organization?
(pick top two challenges facing your agency)

- ☐ Attracting talent
- ☐ Finding qualified candidates for hard-to-fill positions
- ☐ Retaining our talent
- ☐ Remaining staff are overwhelmed given the vacancies
- ☐ Offering a range of career development programs for different groups of employees
- ☐ Getting people ready for leadership positions

(pick top



War for Talent

- Local govt is a service & knowledge enterprise—it is all about talent
- Talent is mobile
- We can no longer rely on “poaching” talent from other agencies
- With significant staff churn, remaining employees are feeling overwhelmed
- Winning the war for talent is more about culture than money



6 Mistakes in Succession Planning

Mistake #1—Relying solely on compensation to win the war for talent

- ✓ Focus on culture, especially learning & career development

Mistake #2—Focusing on position replacement

- ✓ Develop a pool of talent ready to move into variety of positions



6 Mistakes (con't)

Mistake #3—Putting all the attention on the known “stars”

- ✓ Develop “hi-potential” & “B” players
- ✓ Emphasize “soft” people skills

Mistake #4—Over-emphasizing classroom education & training

- ✓ Rely on “learning by doing” + coaching
- ✓ Ideal mix is 70/20/10



6 Mistakes (con't)

Mistake #5—Offering only a limited targeted number of development opportunities

- ✓ Create menu of development opportunities, some intense, some not

Mistake #6—Not training managers on how to conduct development conversations

- ✓ Train managers on simple coaching techniques & provide support for this role





Cal-ICMA's Suite of Talent Development Tools

1. **Template for Talent Discussions with your Executive Team + Sample**
2. **Menu of Development Opportunities** is online fillable resource that can be customized for your agency
3. **A Coaching Model for Managers + a demonstration** of how to conduct a one-to-one development conversation with a direct report—*a training video on how to conduct a development conversation is available on the Talent Initiative webpage*
4. **Stay Interviews**—A list of stay interview questions and a case study of how stay interviews can promote employee retention

These talent development tools are available without charge at www.calicma.org/talent-initiative.



Template for Talent Discussion

Talented Staff Person Name:

Carolyn Brooks

Current Position:

Revenue Officer

Readiness:

Now



Strengths to leverage:

1.

Excellent writing skills

2.

Outgoing

3.

Willing and able to take on projects for other departments

Template for Talent Discussion Cont.

Areas for development:

1.

Capital budgeting

2.

Presentation skills

3.

Supervising

Template for Talent Discussion Cont.

Possible development activities:

1. Attend Santa Clara County Leadership Academy
2. ICMA coaching program
3. Attend CSMFO conference

Cal-ICMA Talent Initiative Resources

- Talent 2.0 report
- Suite of Talent Development Tools
- Other Resources
 - Handout “Ten Ideas to Better Attract, Retain & Grow Talent”
 - Career Compass “To Thrive in Post-Pandemic, Enhance Employee Experience”
 - Career Compass “Succession Planning—9 Classic Mistakes to Avoid”
 - *PM* article “Resetting Organizational Culture—The Power of Stay Interviews



Resources

ICMA Coaching Program

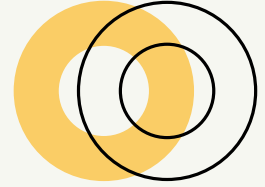
- Webinars
- One-to-one coaching (“CoachConnect”)
- Career Compass advice columns

www.icma.org/coaching

ICMA | coaching program



COUNTY OF SAN MATEO
HUMAN RESOURCES DEPARTMENT



Planning Strategies for Local Government



Presented by: Lisa Yapching
County of San Mateo
Human Resources Department

Succession Planning in a County Setting

WHY IT MATTERS

- Ensure continuity
- Preserve institutional knowledge
- Develop internal talent
- Align talent pool with future needs
- Reinforce status as employer of choice

CHALLENGES FOR COUNTY GOVERNMENTS

- Aging workforce
- Limited resources
- Regulatory requirements
- Uneven readiness
- Talent competition
- Lack of formal process

FRAMEWORK

- Attracting Talent
- Developing Leaders
- Engaging and Retaining Staff
- Capturing Knowledge
- Enhancing Organizational Effectiveness

Build
Employer
Brand

Implement a
coordinated
internship
program

Gather
feedback

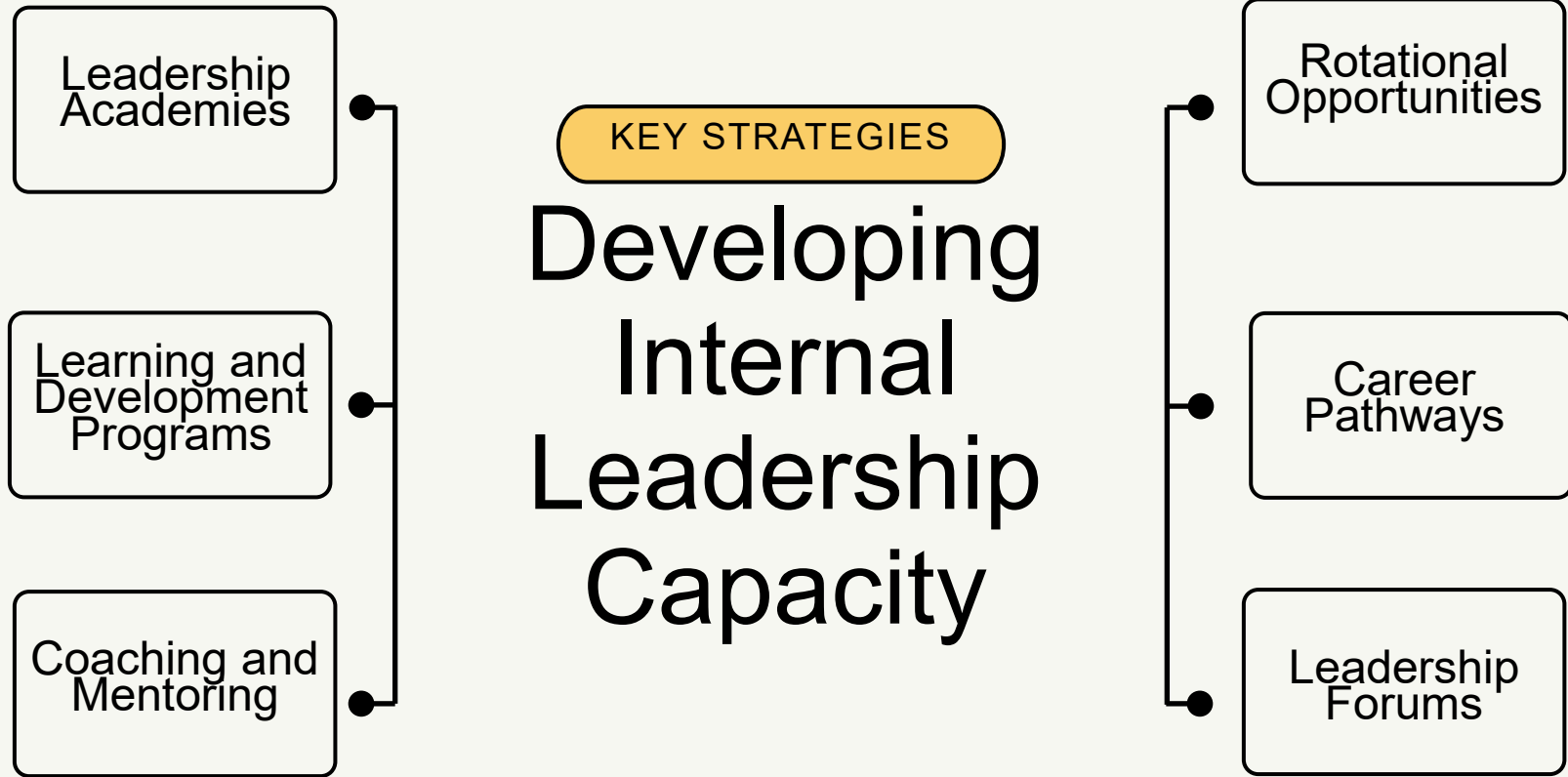
KEY STRATEGIES

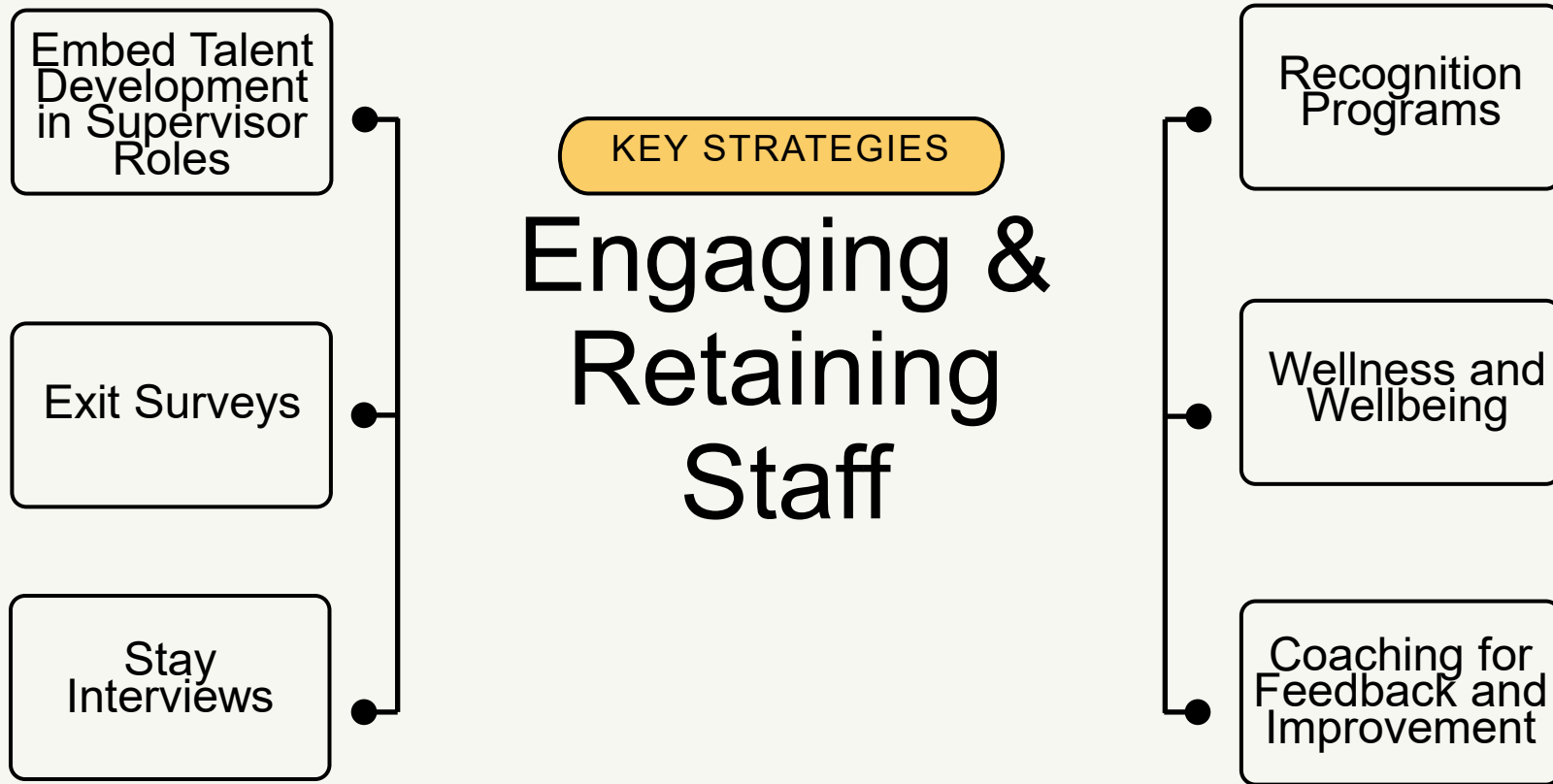
Attracting Future Leaders

Improve
recruitment
process

Encourage
Promotions

Consider
Lateral
Transfers





Overlap critical
roles

Engage new
retirees to
become
mentors

Transition
Management

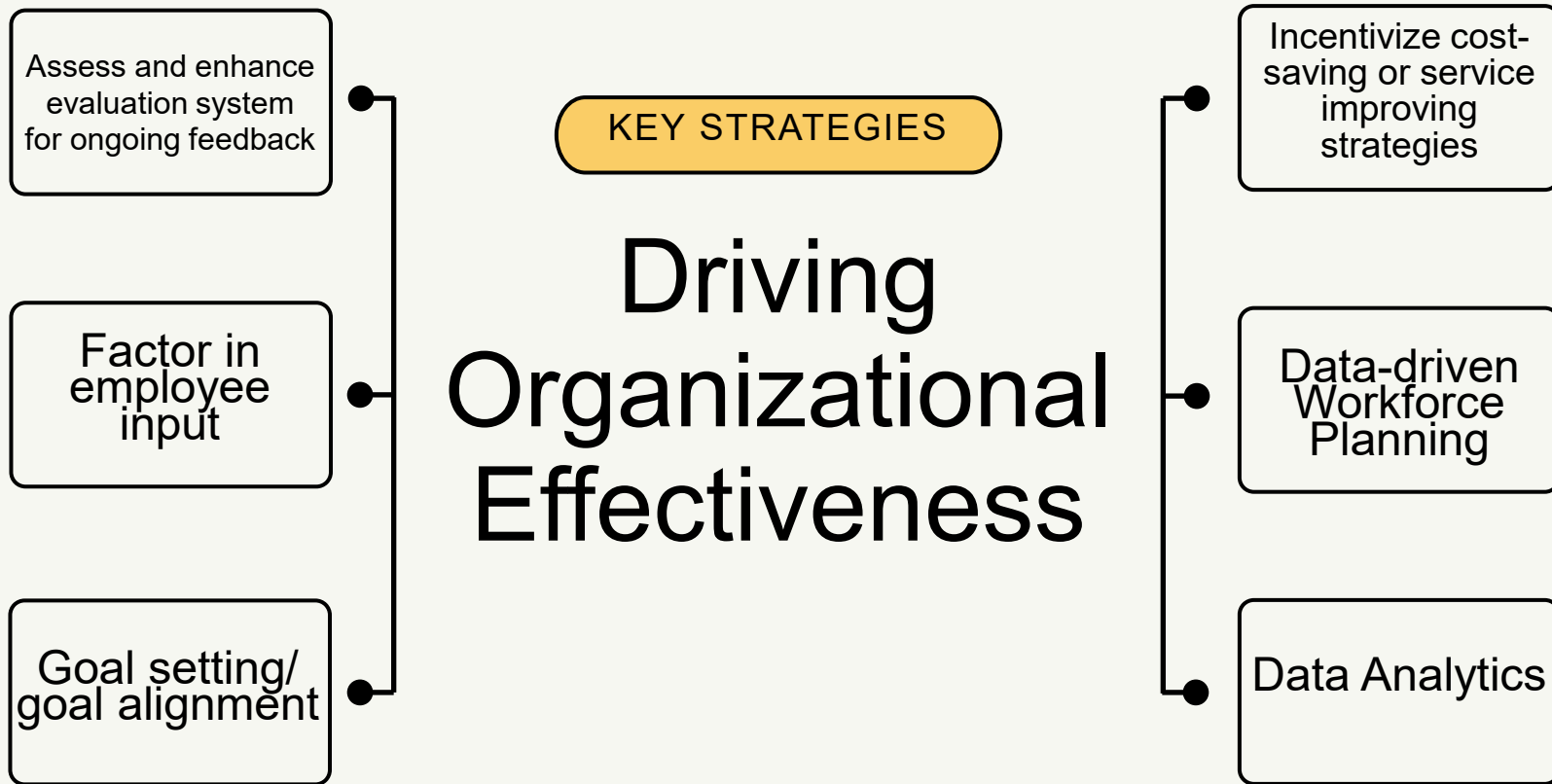
KEY STRATEGIES

Knowledge Transfer & Continuity

Job
Shadowing

Leverage
Technology

Keep tabs of
organizational
debts



Systems that Support our Strategies



1

Learning Management System

Document and deliver training/knowledge sharing
Assist with career pathing strategies
Bridge skills gap

2

HRIS/Talent Management System

Track development, performance and succession pipelines
Analyze workforce demographics
Position Management

3

Survey Tools

Gather input from new hires, employees, exiting employees
Measure engagement, job satisfaction
Pulse surveys

4

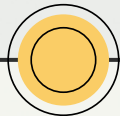
Leadership Development Platforms

Coaching, mentoring and academy programs

5

Applicant Tracking System

Track internal transfer requests
Track retirees interested in special assignments
Hiring/promotion metrics



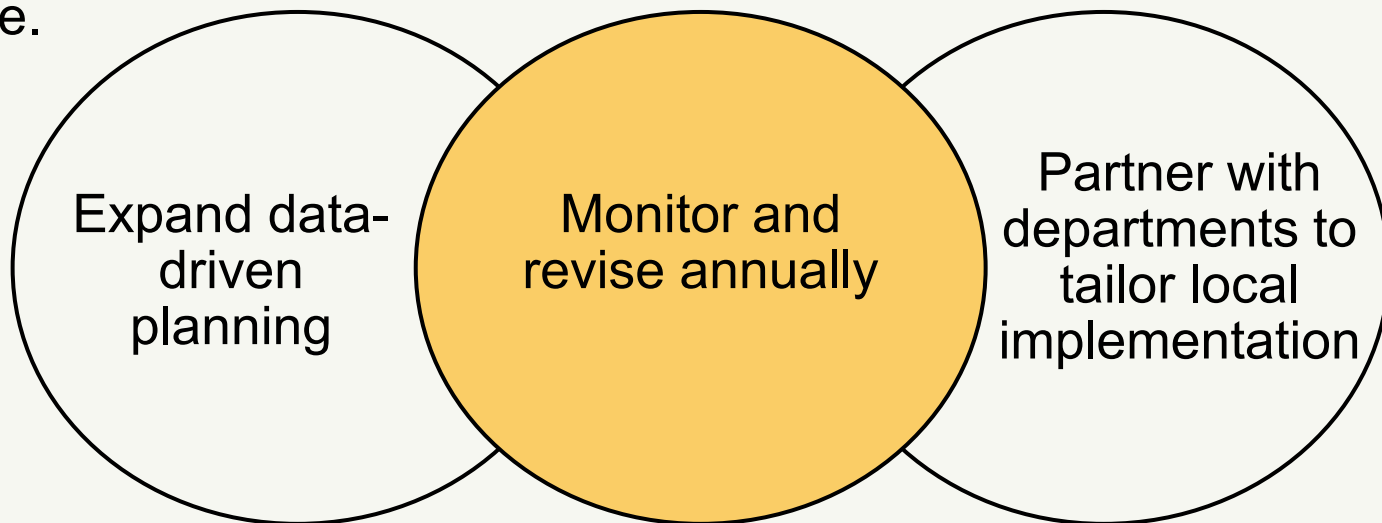
Measure of Success

- % of key positions filled internally
- Reduction in time-to-fill for leadership roles
- Participation rates in development programs
- Retention of high-potential employees
- Qualitative feedback on leadership effectiveness



Measuring and Improving

Succession planning is not a one-time event, it's a continuous investment in our people, our leadership and the community we serve.



EFFECTIVE WORKFORCE DEVELOPMENT STRATEGIES IN MUNICIPAL GOVERNMENT: A WEST SACRAMENTO PERSPECTIVE

Enhancing municipal workforce through
strategic initiatives





Key Focus Areas

Creating An Entry Level Pipeline

Investing in an entry-level pipeline of talent helps reduce reliance on a competitive external job market.

Talent Development Through Internal Leadership Academy

Investing in current talent development ensures that employees are equipped with necessary skills and knowledge for success.

Budget-Conscious Approaches

Adopting budget-conscious approaches allows for effective resource management while maximizing impact on the community.



Challenges in Retaining Talent

Limited Career Advancement

Local governments often struggle with providing sufficient career advancement opportunities, which can lead to talent attrition.

Competition from Larger Agencies

Larger agencies present significant competition for talent, as they typically offer more diverse job opportunities and amenities.

Need for Effective Strategies

Understanding these challenges is essential for local governments to develop effective strategies for talent retention and attraction.



Customized Approaches

Summer STEPS – Early Workforce Engagement

The City of West Sacramento's Summer STEPS (Strides Toward Entering Public Service) internship program provides students with practical work experience in local government.

The program allows the City to invest in its future workforce while demonstrating that students can pursue meaningful careers in public service while giving back to their community.

This eight-week, full-time internship offers hands-on experience, job shadowing, and insight into municipal operations.

Assignments are tailored based on the intern's experience level and the needs of the host department.

Nine City departments each host a minimum of two interns per summer, making this a cross-organizational initiative.

The program cultivates early awareness of civic values, government structure, and career pathways within local agencies.



Nurturing Entry-Level Talent Into Management Roles

Succession Planning Importance

Nurturing entry-level employees is crucial for ensuring effective succession planning within organizations.

Support and Resources

Providing support and resources, such as mentorship and training, fosters professional growth for entry-level employees.

Professional Growth

Encouraging professional development helps entry-level employees transition into management roles successfully.



Overview of Leadership Academy

After success with early-career programs, a gap emerged in leadership readiness.

The Leadership Academy was restarted to grow internal supervisory capacity.

Content includes:

- Supervisory skills & performance evaluations
- Strategic communication & collaboration

Builds succession-ready leaders from within the organization.



Leadership Academy Impact

Developing Future Leaders

The Leadership Academy focuses on instilling leadership qualities in participants, preparing them for future roles in governance.

Essential Skills Training

Participants gain crucial skills such as public speaking, decision-making, and teamwork, which are vital for effective leadership.

Pipeline for Municipal Governance

The Academy fosters a talent pipeline, ensuring a steady flow of competent leaders into local governance structures.



Financial Constraints and Innovative Solutions

Resource Reallocation

Reallocating existing resources can lead to more efficient use of funds and enhance service delivery amidst financial challenges.

Grants and Funding Opportunities

Seeking grants and external funding can provide additional financial support for workforce development initiatives and local projects.

Collaborative Partnerships

Building partnerships with private entities and non-profits can create innovative solutions to address financial constraints and improve community services.



Leveraging Partnerships & Resources

Collaboration with Local Organizations

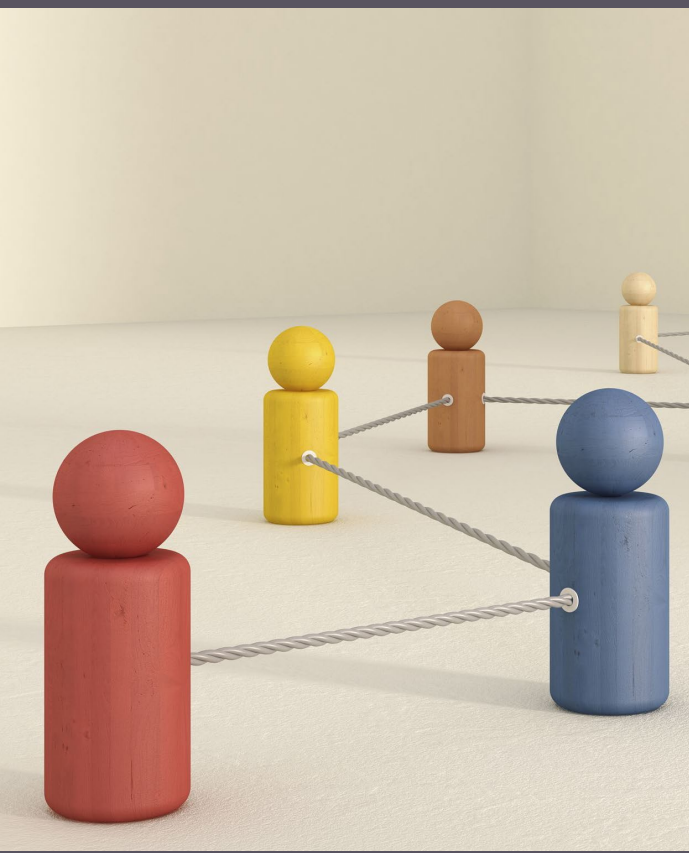
Partnering with local organizations can enhance workforce development by providing vital resources and community insights.

Engagement with Educational Institutions

Collaborating with educational institutions allows access to training programs, and skilled graduates for workforce initiatives.

Inter-Municipal Cooperation

Working with other local governments can lead to resource sharing and joint workforce development strategies enhancing overall effectiveness.



Effective Succession Planning with Limited Resources

Importance of Succession Planning

Effective succession planning is crucial for maintaining workforce effectiveness and ensuring continuity in leadership.

Talent Development Strategies

Local governments can implement strategies focused on talent development to nurture future leaders within their organizations.

Strategic Resource Allocation

Strategic allocation of limited resources is essential for effective succession planning, ensuring that key positions are filled appropriately.



Real-World Examples and Success Stories

Effective Retention Strategies

Real-world examples from West Sacramento demonstrate effective retention strategies that can enhance growth and sustainability. Our City has hired over 15 previous Summer STEPS interns into full time roles.

Lessons Learned

These success stories reveal critical lessons learned in the implementation of retention strategies that can be applied broadly.



AUDIENCE Q&A

What questions or comments do you have for us?



ADDITIONAL RESOURCES

- [Cal ICMA Talent Initiative](#)
- [ICMA Coaching Opportunity](#)
- [ILG Workforce Development & Civics Education Resources](#)
- [ILG Bridge Public Sector Apprenticeships](#)



Links &
RESOURCES



FEEL FREE TO CONTACT US!



FRANK BENEST
frank@frankbenest.com



KAITLYN MONTEZ
Kaitlynm@
cityofwestsacramento.org



LISA YAPCHING
lyapching@smcgov.org



MORGAN BELDEN
mbelden@ca-ilg.org



JOIN OUR WIDESPREAD NETWORK OF LOCAL GOVERNMENT LEADERS



58
Counties

483 Cities
& Towns

2,500+
Special
Districts

20,000+
Local
Agency
Leaders

www.ca-ilg.org/stayinformed



Institute for Local
Government



Institute for Local
Government



@InstituteFor
LocalGovt





RECORDING AVAILABLE SOON



The recorded presentation and materials will be shared electronically with all attendees a few days after the webinar.