

February 2020

ONcall

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Succession planning for a smooth transition

What if you were gone tomorrow? Could someone step into your shoes to do your job?

Planning for someone else to take over when you're sick or leave the company may not be a high priority when your "to do" list is already so long, but it's critically important. It is especially so in one-person departments that have no support staff.

For example, who else besides your communication specialist knows the checklist to follow if there's a crisis in the district and the media are on your doorstep? Who else knows how to post information to your website and send out emergency alerts to parents? Who else even knows the daily tasks that your communication specialist does?

The same questions should be asked of all positions in your district. While it might feel like job security to be the only one who knows how to do particular tasks, it can be a disaster if you become ill for an extended time or decide to take a job elsewhere.

Your district shouldn't be dependent on any one person for its critical functions. Well-functioning districts work as a team, and that requires team members to be able to help each other when needed and to appreciate the value of the work each one contributes. That can't happen if team members don't even fully know what their colleagues do.

Write down what you do

It sounds basic, but every employee should make a spreadsheet listing their day-to-day responsibilities. Organize it by month, so someone can see at a glance what your workload is throughout the year. Be detailed. If your project is to produce a parent handbook, outline what that involves, and show your deadlines for starting work, editing, proofreading, translating and getting it to the printer.

Create checklists for any special projects. For example, if emergency communications are your responsibility, list all of the steps that need to be taken if there's a lockdown or other emergency in the district. These might include:

- Notify all schools and the district office of the emergency.
- Notify the transportation department if bus routes need to be delayed or changed.
- Notify food service if lunch times will be disrupted.
- Prepare a script for your receptionist to read to callers.
- Notify the School Board.
- Notify the media.

Next, list who will own each of those tasks if you are gone. That doesn't mean the designated person is necessarily your job successor if you should leave. It just means that the important

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tasks that you do will not be overlooked in the meantime. It will also serve as a transition planning tool if it's ever necessary to replace you.

This type of planning is helpful not only for any successor but also for you in staying on track in your day-to-day assignments. A list that you review frequently helps assure that important tasks don't slip through the cracks.

Finally, write down the passwords you use to access the tools of your trade, including work email, web pages, social media pages you use for work, etc. Write them on one page and keep it in a "succession" file along with other important materials that your successor can easily access.

Archive your work

Keep copies of important work that you do — flyers, letters, handbooks, posters, press releases, etc. Create an online folder (such as a Google folder) where you can store materials and easily share them with your supervisor or other key people. It can be helpful to also keep a folder with printed copies of important materials.

Train others in what you do

Make sure that at least one or two others know how to do the critical tasks of your job. If your company is small, cross-train employees from other departments to ensure there is someone else who knows the ins and outs of what you do. It's a smart idea to have those colleagues perform those tasks occasionally, even if you're not gone. That allows them to become familiar with what's required while you are available to answer questions or provide additional training. It's also a way for you and your supervisor to spot who might have the potential for replacing you someday if you ever decide to leave.

Keep everyone in the loop

It's easy for individuals and departments to operate in silos, but companies are much more effective when departments work cohesively. It's good practice for departments to regularly share information about the key tasks they are working on and any challenges they are facing. Some companies have monthly lunches or staff meetings where each department gives a quick update on what they are working on and how they are working with other units. These meetings give insight into what different departments are doing and help build an appreciation for the work happening throughout the office or department.

Be prepared

The Boy Scouts' motto is "Be Prepared," and that's what you should be too. You never know when illness might sideline you, or when a tempting job offer will come your way. Even if you never intend to leave your job, it's smart to plan ahead so that your work can continue seamlessly if you do for some reason. That not only benefits the company but also reflects well on you and the legacy you leave.