



# NATIONAL CONFERENCE OF METROPOLITAN COURTS *GOLDEN ANNIVERSARY*

**Succession Planning Concepts and  
Implementation: Lessons from Philadelphia**

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First Judicial District of PA  
Philadelphia County**



# Succession Planning Concepts & Implementation: *The Philadelphia Experience*



*Special thanks and recognition are  
extended to:*

*Brenda J. Wagenknecht-Ivey, Ph.D.  
PRAXIS Consulting, Inc.*



"I want you to meet my son Edward.  
One day, this company will belong to him  
and I think it's time for all of you to get to know  
each other."

# Succession Planning -- **Why bother?**

- Baby Boomers – *first generation of Professional Court Managers*
- In 2018, almost 80% of the workforce will be over 50 years old

# Unsuccessful Succession Planning...



Hosni Mubarak



Mohamed Morsi

# Unsuccessful Succession Planning...

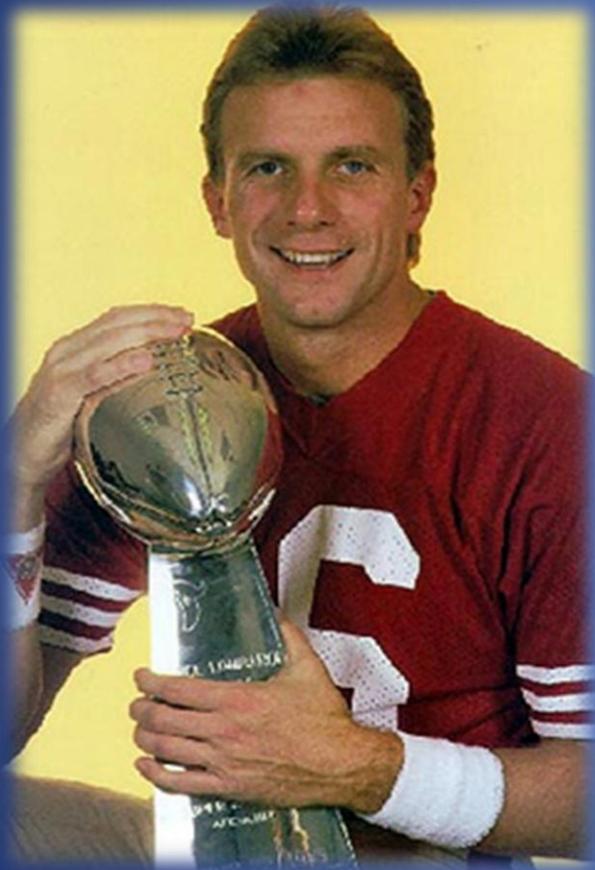


Richard Nixon



Spiro Agnew

# Successful Succession Planning...

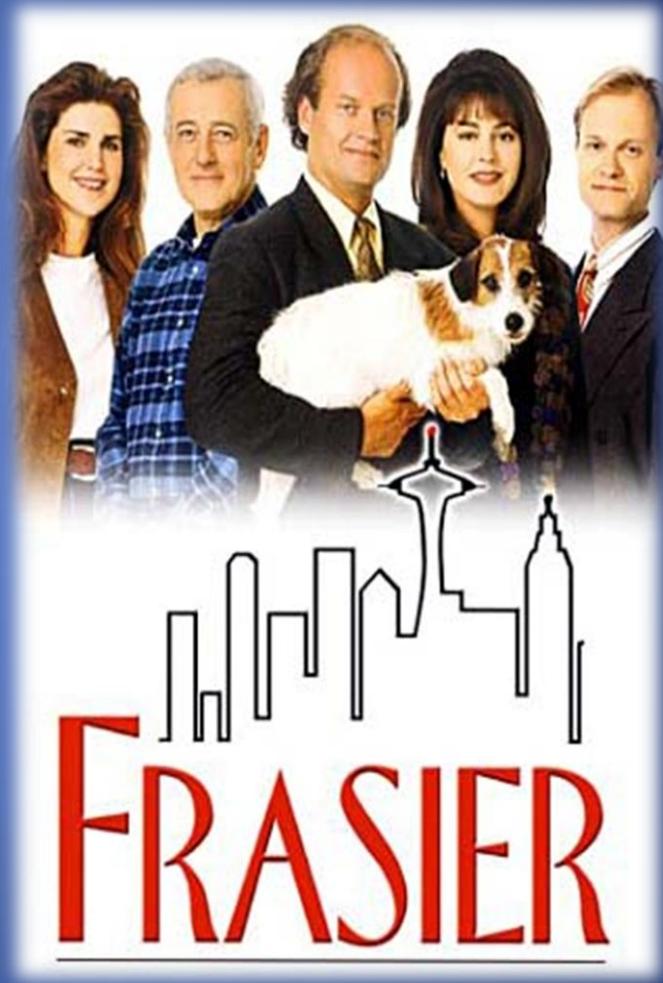


Joe Montana



Steve Young

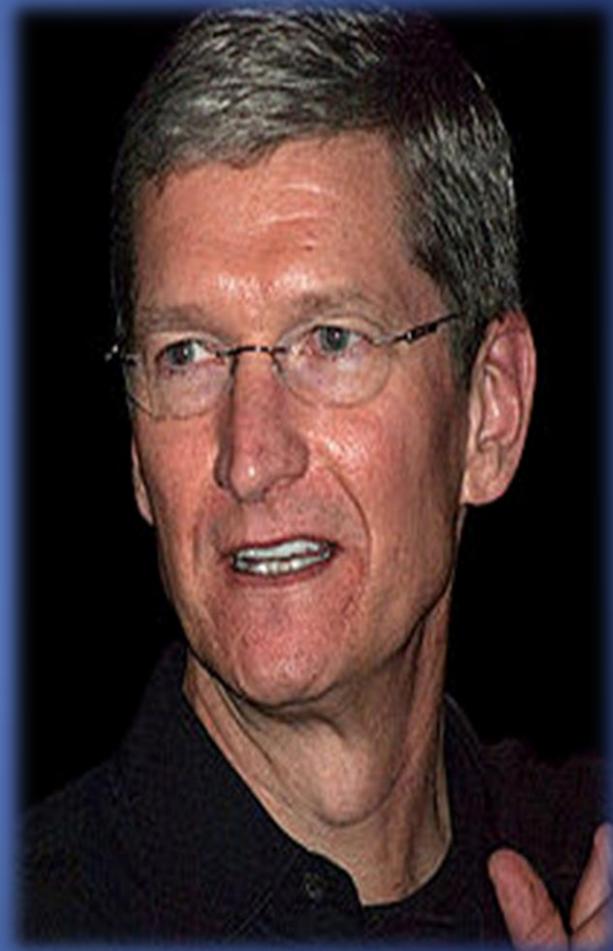
# Successful Succession Planning



# Successful Succession Planning



Steve Jobs



Tim Cook

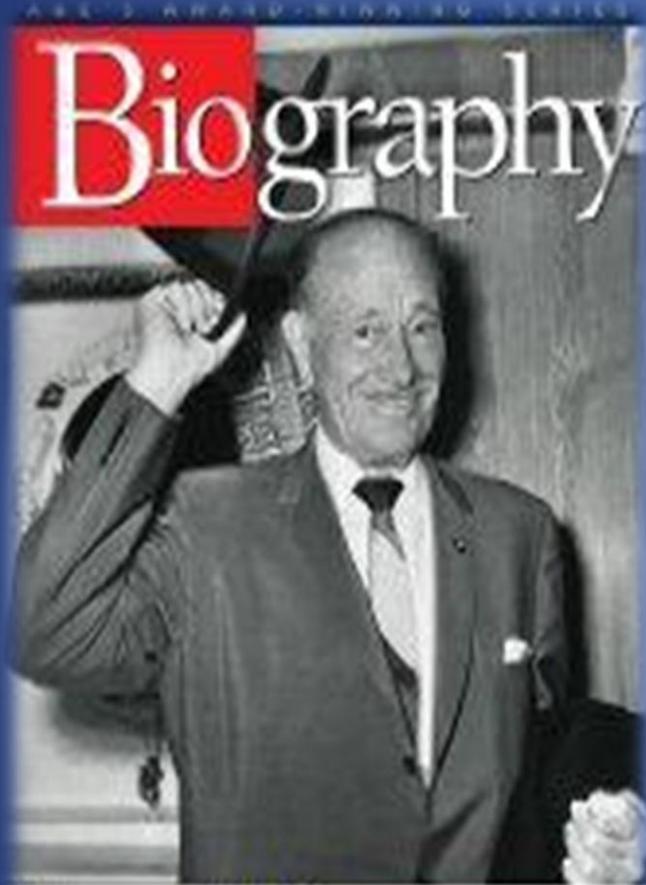
# Successful Succession Planning



Steve Ballmer



# Natural Succession Planning...



*Conrad Hilton*

**INNKEEPER**



*Paris Hilton*

**INMATE**

# Does Anyone Really Do This?

- United States Office of Personnel Management
- Michigan
- New York
- Alaska
- Delaware
- Iowa
- Colorado
- California
- Wisconsin
- Georgia

# What is Succession Planning? And Why Do It?

- Systematic effort to identify, train, & retain “high-potential” employees
  - *those who are capable of advancing 2 or more levels from current positions; prepared to assume “key” positions;*
- Matches present talent to future needs;
- Baby Boomers leaving en masse, fewer in next generation moving in to fill the vacuum;
- Invest now for future needs.

# Succession Planning: Benefits

- Retains institutional knowledge;
- Maintains continuity in key positions; seamless transition;
- Provides opportunities for talented staff;
- Encourages advancement of diverse groups;
- Provides a career path to retain & motivate employees;

# Succession Planning: Benefits continued

- Finds the best fit from inside the organization;
- Shortens the learning curve;
- Provides for consistency & organizational stability; and
- Maintains internal and external relationships.

# Characteristics of Best Practices Approaches

1. Must have judicial buy-in.

**POLICY STATEMENT OF THE FIRST JUDICIAL DISTRICT OF PENNSYLVANIA, PHILADELPHIA COUNTY:**

*The District recognizes the managerial talent of its employees and seeks to develop future leaders from among its staff. The Administrative Governing Board (AGB) will promote this administrative congruity through the establishment of a management development program, which will develop the skills necessary for leadership.*

# Characteristics of Best Practices Approaches continued...

2. Simple and easy to use.
3. Developmentally oriented rather than simply focused on having a “slate” of replacements.
4. Actively involve the very top players of the organization.

# Characteristics of Best Practices

## Approaches continued...

5. Recognize gaps in talent and identify important “linchpin” positions.
6. Frequent checkpoints throughout the year.
7. Continuous review, refine, and reinvent as needed.

# Generational Conflict

- Traditionalists – 1922-1945
- Boomers – 1946-1964
- Generation X (Gen Xers) – 1965-1980
- Millennials – 1981-2000

Blz



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*“So, Fleckman, I’ll need you to move quickly on that Succession Planning.”*

DAVE BLAZEK  
dblazek@phillynews.com

# Development Opportunities

## ❖ Roundtable Discussions

- Democratic
- Cheap (brown bag lunch)
- Diverse
- Enlightening – spot the potentials

## ❖ Stretch Assignments

- Testing ground
- Personally rewarding
- Enthusiastic reception and participation

# Development Opportunities

## ❖ Job Rotation

- Organizational resistance
- Potentially rewarding but difficult to gain acceptance

## ❖ Job Shadowing

- Mentoring/Coaching
- Internship

# Development Opportunities

- ❖ State/Regional Conferences
  - Affordable
  - Quality professional education
  
- ❖ National Conferences
  - Expensive but worth it
  
- ❖ 360-Degree Evaluation

Warning!

Warning!

Warning!

# 360-Degree Process

- ✓ Subordinates
- ✓ Superiors
- ✓ Peers
- ✓ Self

**“Tell me what you really think!”**

# 360-Degree Process

- Leadership –
  - Articulates a compelling and inspirational vision of the Court to staff
- Management & Supervision –
  - Follows through on what he/she says he/she will do

# 360-Degree Process

- Decision Making/Problem Solving –
  - Is decisive; makes tough and timely decisions
- Interpersonal –
  - Is trustworthy; tells the truth and is trusted by people at all levels
- Strength of Workplace –
  - Helps everyone understand the importance of their work

# 360-Degree Process

- Building External Partnerships –
  - Communicates effectively with external justice partners
- Strategic Thinking & Planning –
  - Has established long term goals and strategies for improving performance

# 360-Degree Process

- 1) Make it voluntary;
- 2) Must not be used against the employee;
- 3) Administered by Consultant;
- 4) Lead from the front;
- 5) Facilitated feedback session;

And most importantly -- be prepared for...

## 6) Initial emotional and visceral reaction!



# Ways to Lessen the Costs of Formal Training Programs

- Share the cost with others;
- Look at “per person” cost – appears much less shocking;
- Combine above two strategies;
- Seek out county-sponsored programs;
- Use colleagues from other jurisdictions as presenters;

# Ways to Lessen the Costs of Formal Training Programs continued

- Use statewide and regional professional organizations, as well as AOC;
- Use technology – web based or video presentations;
- Seek alternate funding sources;
- Utilize skilled internal staff;
- Meet yearly to discuss the participants in the program.

# In Summary...

MDP – Management Development Program

Must

Develop

People

It is important to:

- Identify current resources
- Develop a long term strategy
- Address future needs
- Cost effective and organizationally rational approach

*“The Best Way to  
Predict the  
Future is to  
Create It.”*

*Peter Drucker*

Thank you for your interest and participation  
in “Succession Planning Concepts and  
Implementation: Lessons from Philadelphia.”

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