



Succession Planning Toolkit



Working together to promote the
growth and development of the mass
appraisal industry around the world



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“The greatest key to succession planning and to building our future leaders is to provide educational and training opportunities to the professionals we hire. Our field is so unique and interesting, and by providing access to mass appraisal and new technology education, we build the excitement employees feel about what they can learn and accomplish. Training opportunities that also include teaching leadership and communication skills will truly develop our profession’s future administrators.”



Dorothy Jacks, AAS

2018 IAAO President
Property Appraiser,
Palm Beach County
West Palm Beach, Florida

Jump-Start Succession Planning

“*Growing other leaders from the ranks isn’t just the duty of the leader, it’s an obligation.*”
— Warren Bennis

The assessment industry is facing a retirement crisis. The recent IAAO Assessment Industry Compensation Survey found that almost half of assessment professionals in the United States will be retiring in the next nine years. Similar findings and concerns have been expressed internationally. Most valuation agencies have very limited resources to meet the challenges of replacing seasoned professionals and therefore need to take matters into their own hands.

This guide was created to jump-start these efforts by offering steps to initiate strategic succession planning for developing new industry leaders. There is no one-size-fits-all approach that emphasizes and embraces succession planning—commitment and creativity are the keys to success.

The best approach is to identify and define the process that works best in each individual office setting. For small valuation jurisdictions, succession planning has to be the goal of all employees. Larger valuation jurisdictions need to engage all office leadership at every level.

▶ GETTING STARTED

Set the tone and become a catalyst in creating an open communication environment within the valuation office.

A successful succession planning program must be the goal and objective of the leadership throughout the agency. This goal must be shared, actively promoted, and communicated by all office leaders. Succession planning should not just be a program within the human resources (HR) department. The HR department can be very helpful in facilitating aspects of the succession plan, but succession planning must be a universal and highly important goal of office leadership. It must be embedded in the office culture and clearly communicated to all employees.

Succession planning should not be an annual event that occurs only during employee reviews. Clearly defined, documented, and transparent pathways to professional success should be a signature of government valuation offices worldwide. These pathways to professional success not only improve employee morale but also facilitate the recruitment of young professionals who are looking to understand the advancement opportunities and intellectual challenges available within government organizations.

Revisit and refine the agency's long-term strategic plan.

Strategic plans for government valuation organizations usually include the universal objectives of improving transparency to the public and increasing operational efficiency. Long-term strategic plans need to be refined to include the goals of continual and successful professional development and succession planning.

Provide multiple avenues for training, not only in mass appraisal techniques but also in new technologies for all areas of operations. Success in succession planning takes time to achieve. The process starts with examining current goals and the office environment, but it is well worth the time and effort.

Review the current organization chart.

Define each valuation office position in the current organization chart, and, more importantly, define the skills and competencies needed for each position. During this review, be aware of how many leaders in the organizational structure are veterans of the industry. Valuation leaders who have obtained high-level positions through years of experience and managerial challenges need to participate in the succession planning process and must commit to training and mentoring office leaders in the future.

This review should proceed as follows:

1. Compare the long-term strategic plan to the current organization chart to determine whether the current framework aligns with the organization's long-term goals.
2. Evaluate whether the current organizational structure fits; in other words, do the current organizational structure and job definitions work together to achieve all the goals of the strategic plan?
3. If the answer is no, schedule some planning sessions. This exercise identifies gaps in both current positions and organizational structure that need to be filled to reach long-term objectives. This is a starting point to understanding the agency's future personnel needs as well as professional development requirements. Sometimes this process, which identifies risks and needs of the organization, is described as a critical component of an environmental scan.
4. Think about what needs to be included in future job descriptions. To create a pool of future leaders, the managerial skills and duties required must be detailed. Input and consensus from office leadership are needed to brainstorm and envision a new, completely detailed organization chart for the future. Some work will be required to redefine current job descriptions and responsibilities and to identify the skill sets and proficiencies necessary for each new position. Periodically revisiting the organization chart and position definitions is always recommended to enable and create a government agency structure that is dynamic enough to meet future goals and to attract the next generation of workers.



Knowing exactly where you are as an organization and how that fits into where you want to go in the future starts this success planning process.

5. Determine a path to human capital development, but frame the discussion in targeted and specific terms. Once a new organization chart is in place, clear pathways to success within the organizational framework can be created. One method is to prepare detailed job descriptions and job tracks for all positions within the valuation office. For example, an agency most likely has a starting position for a property analyst. List and describe the skills and proficiencies for that entry position, and repeat this for every entry-level position within the office. Listing the skills for each entry-level position, along with expected production rates, clarifies the expectations of that job function for new workers.
6. Create the same detail in job definitions and expectations for each position at the next higher level. Be as clear as possible in itemizing the additional skills necessary to meet the requirements of that position. Continue this process up to the top-level leadership positions within the agency. Defining what is expected of leaders by describing the components of the competencies of leaders is critical. In summary, guidance for expected skills of both employees and managers needs to be clear and differentiated at all job levels. Knowing the intermediate- and advanced-skill levels that must be achieved by employees facilitates transparent opportunities for advancement for all employees.
7. Remove the guesswork about the expectations for obtaining a higher position. Although a thorough job of constructing job advancement pathways is time-consuming, this critical process develops job tracks and identifies professional advancement pathways. Job tracks and career paths that are clearly defined, that can be measured, and that are openly shared throughout the agency give direction and motivation to both new and mid-career employees. Voluntary participation and

self-selection by employees are the keys to successful succession planning. Leaders need to be developed within the office, but these are self-motivated individuals who have chosen to personally accept the additional challenges and tasks required by detailed job tracks for becoming managers and joining leadership.

8. Assign a dedicated person in the agency to assume the responsibility of understanding the job tracks that have been created, to answer questions about their definitions, and to explain the evaluation tools the office is using to monitor performance and progress.
9. Ensure that professional advancements pathways are reviewed and revised in the future. Pathways need to be updated and relevant to new technology and mass appraisal advances. Organizational data analytics has been a popular word over the last eight years, but in succession planning, data analytics has been coined as people analytics. Enable talent-driven employees to become future leaders within the office by showing them the career advancement ladder and how to climb it.

Promote professional training.

Valuation office leaders must advocate for various avenues and types of professional training within the office. Valuation leaders need to be the champions of professional development for all their employees. This involves requesting and justifying budgetary dollars for life-long learning and training of employees to support and facilitate defined career pathways. Identifying knowledge gaps of current engaged and eager-to-learn personnel also develops a business case for additional professional training funds or, if needed, for new positions that often require very high technical skill levels.

“Leaders don’t create followers, they create more leaders”

— Tom Peters

► SUCCESSION ACTION PROGRAMS

Future leaders within an organization outperform other employees, and this can be quantified by productivity levels, active participation in education and training programs, and a willingness to undertake more responsibility including management of projects.

There are many creative ways that valuation officials can make use of to develop an engaging learning environment within the office to promote opportunities for professional advancement. Employees who have clearly expressed an interest, and quantifiably proven their commitment to advance, should have exposure to other roles and functions within the office.

Allow and designate time for employees to shadow senior analysts and valuation office leaders.

In office shadowing, a very effective hands-on training approach, newer employees accompany current leaders throughout the entire day to gain a practical understanding of their operational oversight duties and additional responsibilities. Many newer employees may have the technical skills to complete valuation tasks, but they may not have any experience in workload management or personnel scheduling. Shadowing provides practical exposure to leadership skills that are essential for successful valuation administration. Shadowing also allows newer employees to understand resource constraints and timeline pressures prevalent in valuation offices, providing a practical framework for their input and suggestions.

Create a mentor program throughout the office.

Established office leaders and professionals can participate in a mentor program, further illustrating the skills required for senior positions within the office, whether technical, managerial, or a combination of both. For newer employees who are eager to create long-term professional goals, experienced employees volunteering as mentors are invaluable by providing assistance in defining specific objectives new employees need to achieve those goals. Letting new employees know what is expected of them to

advance is very important, because succession planning requires individual employee commitment to a defined process and clear expectations.

Technical skills and expectations are easier to define and evaluate than leadership skills. Leadership and personal interaction skills, often called soft skills, are developed through both leadership training opportunities and practical hands-on experience—shadowing and mentoring foster both.

Utilize the power of the internet and online resources.

A problem that many valuation jurisdictions face is limited or no budgeted resources for leadership development, so creativity is an absolute must in teaching leadership skills in any succession plan. Using leadership skill-building resources that are available on the internet and sharing them with staff members is a cost-effective solution. Shared electronic folders of articles and open-source materials on leadership skills is a proactive solution to limited time and resources. Create separate folders for resources covering skill sets used to build and define leadership skills, such as

- Improving communication skills
- Becoming an innovator and visionary through clear direction
- Acting as an empathetic team and trust builder
- Cultivating capabilities focusing on results.

Shared electronic folders on valuation management skill-building can also be created covering topics such as:

1. Budgetary processes and planning
2. Effective management and scheduling of work production for various valuation functions:
 - Permit processing
 - Field operations

- Mass appraisal processes
- Appeals management
- Exemption processing

Office leaders can also contribute to these folders by sharing the operational methods they have used to manage workloads in the past. Learning how to properly assign personnel for the various workloads and functions of valuation offices is paramount to reaching critical deadlines. The internet offers a wide variety of transferable and comparable resources; use them and share them throughout the valuation agency as a very cost-effective tool.

Foster open promotion practices.

The leadership of the office can identify employees who have excellent work records and show great promise. Removing old traditional promotional processes, such as current leaders selecting an individual or individuals to become the heir-apparent leaders, leads to an open and level playing field. Transparent opportunity pathways and honesty foster an environment of leadership opportunities attractive to younger workforces.

Match job functions and positions to employee strengths.

Do not confuse the titles of subject matter expert and office management leader. Although a leader or manager in the office may also be a subject matter expert, it may not work the other way around. For example, the valuation senior subject matter expert for commercial property analyses may be a fantastic number-cruncher and value-estimator, but may not have an interest in obtaining leadership skills or the desire to manage personnel. Unless both skill sets—subject matter expertise and leadership—are equally possessed by an individual, separating the office leader and a senior subject matter expert into two different positions usually better serves organizational goals.

Lead the way.

Valuation office leaders are often described as good communicators and employee coaches. Office leaders need to formally evaluate employees regularly to offer continu-

Here's what Travis Horne, IAAO U-40 leader and Revaluation & Assessment Appeal Coordinator, City of Saskatoon, Saskatchewan, says about what the younger workforce is looking for in an organization.



What are you looking for in government positions?

"Solid balance between work and life—good pay, great benefits, and time for the family."

What professional training is needed, and what should be clear paths to advancement?

"You can never have too much training or credentials. Identify what the office needs and fill that need. Make yourself indispensable – advancement follows. Careers in assessment have been one of the best kept secrets, but the secret is out. There's an unbelievable mix of roles in assessment offices—it would be hard to find one that wouldn't align with a young professional's preferences (desk job, statistics, inspections, residential, oil, farmland, and of course, appeals)."

What should government valuation offices be doing to attract good government-minded young professionals?

"Get the word out. No one knows what an assessor is or that it's a great career. It's no accident it's called the accidental profession—people try it out and never want to leave. Highlight not only the remuneration in terms of salary but also the benefits and the working environment."

—Travis Horne
Revaluation & Assessment Appeal Coordinator
City of Saskatoon, CANADA

al feedback and guidance. Evaluation and review should be an integral part of individual counseling for career development. An individual's current skill set should be clearly defined, articulated, and communicated through employee review. Clearly communicating to an employee "where they are" and, most importantly, what is expected for career advancement should be part of that evaluation and review process.

Periodically monitor and revisit the goals in the strategic plan. The revision of specific objectives of the office should be periodically reevaluated and clearly communicated to all employees.

Retention of new and mid-level employees is very important, and creating a transparent succession planning program improves employee retention rates. Today's younger workforce is looking for an emphasis on diversity, inclusion, and flexibility within the workplace. Illustrating that the agency is committed to these goals and to employee well-being benefits and strengthens everyone in the valuation agency.

► STRATEGIES FOR RECRUITING NEW PERSONNEL

Establish professional relationships with local area universities, colleges, community colleges, and job placement centers including veterans' organizations. For many government units, qualified military veterans are often given priority in potential position selection.

Find a contact person in each of these organizations to identify potential candidates for future employment. Establish a relationship with this contact person by explaining the benefits, intellectual challenges, and opportunities in the world of government valuation offices.

Many educational institutions and vocational service centers have career placement units that are unaware of the challenging opportunities for interns, graduates, and constituents within valuation offices.

Develop innovative internships.

The Palm Beach County, Florida, Property Appraiser's Office offers paid summer internships for students. The office has been proactive in providing opportunities for young adults to gain exposure to the industry as they enter higher education. This internship program not only serves the community but also fosters interest in public service and the assessment profession.

Creating internships for both college- and graduate-level students both provides cost-effective exposure to the valuation industry to an emerging future workforce and allows interaction with a potential new full-time employee. Internships can also be for course credits if internship funds are not available, offering life experience for a well-rounded education.

Reach out to career placement officers.

When the agency has a succession planning process in place, sharing the agency's commitment to the professional development of new hires with career placement officers ensures that the agency is perceived as an interesting and very desirable place to work, and as a diverse work environment with a positive message of "you can move up"!

It is common practice for government agencies to publicly advertise positions, but proactive recruitment in hiring is sometimes overlooked. Establishing these relationships can maximize recruitment and pipelines to obtaining the best possible entry-level candidates.

Utilize templates of career advancement pathways and lessons learned from other valuation agencies to develop and customize the agency's own on-ramps and career ladders for positions within the office. Communicate new thoughts and share ideas with other valuation leaders to revise succession planning strategies.

▶ LESSONS FROM AN INNOVATOR

The City of Milwaukee's Assessment Commissioner Steve Miner has been a creative pioneer in succession planning. Steve is always adding to his online catalog of leadership articles and tools as a manager's resource within his department. With Steve's leadership, the office has already created openly shared professional development and advancement pathways for every type of job function. Steve has cultivated contacts at local universities and other organizations throughout Wisconsin to proactively recruit the best candidates possible for the development of the office's future leaders. Steve has a clearly defined and executed succession plan. Steve is an active IAAO member advocating information-sharing among valuation administrators by helping other IAAO members in succession planning, leadership development, and employee safety implementation.



“We are achieving professional development results by providing training and creating career ladders that provide pathways for professional development for staff members.”

— Steve Miner

“Staff members make up the heart of every organization. As Assessment Commissioner, I view my role as providing a vision for the office, setting high standards, and supporting the staff by providing them with the tools, resources, training, and opportunities that will enable them to reach their goals. This is all done so our office can provide the city with the best service possible. All the department supervisors have similar responsibilities of supporting the individuals who report to them. This staff-centric focus creates an environment of trust and support in which everyone can work together and fulfil their own potential.

Recruiting a diverse staff and developing existing talent are high priorities for the Milwaukee Assessor's Office for several reasons:

- The city's goal is a diverse **workforce that reflects the city population.**
- Current staff members have stated a need for additional **training opportunities.**
- A high number of **existing employees are eligible to retire.**
- There are a number of **high-quality people already in the office.**
- **Developing existing staff people** is less time-consuming and more efficient than recruiting from the outside.
- **Providing growth opportunities** to everyone is the right thing to do.

We are achieving professional development results by providing training and creating career ladders that provide pathways for professional development for staff members.

We are also focusing outreach efforts on regional educators. This effort provides avenues for sharing information with potential future employees and enables those institutions to partner with the city to provide entry-level positions to recent graduates.

When hiring staff members, our management team looks for the unique talents that each individual brings, and then works to develop those

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talents. This practice creates an environment in which everyone feels valued and wants to perform at higher levels.

When I started in Milwaukee, I took the time to talk with every person in the office. Over the first few months, I listened to find out what was important to each staff member. By summarizing the information and categorizing all the comments, I determined what should be the focus of my tenure. This information enabled me to develop a work plan that supported the staff members while implementing the upgrades and changes that the office needed. The three most important items for the staff were training, better use of technology, and consistency from the management team. Focusing on the staff's priorities improved attitudes and communication and enabled us to tackle technology upgrades with positive attitudes.

I have found the concepts of Servant Leadership serve our office well. A servant leader focuses primarily on the growth and well-being of people and the communities to which they belong. While traditional leadership generally involves the accumulation and exercise of power by one at the “top of the pyramid,” servant leadership is different. The servant leader shares power, puts the needs of others first, and helps people develop and perform as highly as possible.

I am humbled and grateful to be in the leadership position in Milwaukee. By relying on IAAO for research, educational opportunities, professional contacts, and professional standards, I am better able to provide leadership to the Milwaukee staff and serve the City of Milwaukee.

— Steve Miner

City of Milwaukee's Assessment Commissioner

IAAO—THE KEY PROFESSIONAL DEVELOPMENT AND SUCCESSION PLANNING RESOURCE

IAAO offers ethics, training, industry standards, professional designations and a worldwide support network for workforce development in the valuation industry.

Employer-to-employee engagement is critical to retaining invigorated and engaged leaders of the future. Establish within the budget life-long opportunities for advancement skills and additional learning. Collectively we can create the positive message that there are great opportunities in the valuation industry worldwide. Communicating the exciting and challenging pathways to professional development and leadership training within government valuation offices will ensure our continued success in the development of good governance in property tax administration.



► INTERNET SUCCESSION PLANNING RESOURCES

- *Talent Pipeline Management*, by the U.S. Chamber of Commerce Foundation. Available at <https://www.uschamberfoundation.org/talent-pipeline-management>
- *Managing County Workers: Recruitment, Retention and Retirement* (2017), by Andrew Hartsig with the National Association of Counties (NACo). Available at <http://www.naco.org/resources/managing-county-workers-recruitment-retention-and-retirement>
- *Harnessing the Engagement of Your Employees* (2017), by Andrew Hartsig with the National Association of Counties (NACo). Available at <http://www.naco.org/resources/harnessing-engagement-your-employees-0>
- *Workforce and Succession Planning*, by U.S. Office of Personnel Management. Available at <https://www.opm.gov/services-for-agencies/workforce-succession-planning/>
- *Effective Succession Planning in the Public Sector* (2007), by Brian Wilkerson with Watson Wyatt Worldwide. Available at <http://www.4cleanair.org/Chicago/EffectiveSuccessionPlanningforPublic.pdf>
- *Succession Planning Tool Kit* (2007), by State of Michigan. Available at https://www.michigan.gov/documents/mdcs/SuccessionPlanningCareerPipelineToolKit_213235_7.pdf
- *Why Governments Need to Ramp Up Succession Planning* (2016), by Patrick Ibarra with Governing the States and Localities. Available at <http://www.governing.com/columns/smart-mgmt/col-government-workforce-importance-succession-planning.html>
- *State of California Succession Planning Model*, by California Department of Human Resources. Available at <http://www.calhr.ca.gov/state-hr-professionals/Pages/State-of-California-Succession-Planning-Model.aspx>
- *Ohio's Talent for Tomorrow and Beyond* (2011), by the Ohio Department of Administrative Services. Available at http://www.das.ohio.gov/Portals/0/DASDivisions/HumanResources/LPD/pdf/Succession_Planning_Mgrs_Toolkit.pdf
- *How to Implement Succession Planning*, by the Social Security Administration (SSA). Available at https://www.ssa.gov/section218training/basic_course_8.htm
- *Assessment Industry Compensation Survey* (2017), by the International Association of Assessing Officers (IAAO). Available at <http://www.iaao.org/store/detail.aspx?id=BK0100>

- *Governments can attract millennials...by rethinking recruitment practices* (2017), by Kevin Prine, Fair & Equitable, International Association of Assessing Officers (IAAO). Available at www.iaao.org/library (IAAO member access only)
- *Recruiting and retaining good people—It's more than money!* presented by Clara Woodmansee, Tiffany Burns, and Lori Schlotter at the Annual International Conference on Assessment Administration 2008. Available at www.iaao.org/library (IAAO member access only)

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INTERNATIONAL ASSOCIATION *of* **ASSESSING OFFICERS**

WE are a professional membership organization of government assessment officials and others interested in the administration of the property tax. We were founded in 1934, and we have more than 7,000 members worldwide from governmental, business, and academic communities.

WE are the internationally recognized leader and preeminent source for innovation, education, and research in property appraisal, assessment administration and property tax policy.

WE are IAAO, and **WE** value the world!



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