

Developmental Services Human Resource Strategy

Ontario Developmental Services
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Talent Management and Succession Planning Guide for Agencies in the Developmental Services Sector

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Executive Summary

The 2013 Developmental Services survey on Talent Management and Succession Planning found that only 29% of organizations had a documented succession plan for positions on their senior leadership team. Only 17% that responded had a succession plan for other deemed critical or key positions in their organization. As of July 1, 2014, Statistics Canada population estimates show, for the first time, that there are more Canadians aged 55 to 64—the age when people typically leave the labour force—than there are Canadians aged 15 to 24—the age when people typically enter the labour force.

Given these statistics and the general acceptance that many leaders in the sector are at or near retirement age, it is important to raise succession planning and talent management as a critical Human Resource challenge in the sector.

Organizations must have an active and effective succession planning and talent management process in place to help ensure organizations are well-positioned for success in the future.

This Guide has been created to be a resource for organizations in our sector. It is not meant to be a prescribed process to follow but rather support to assist organizations in preparing for succession planning and talent management. Organizations are free to borrow these practices and ideas in order to meet the needs of their organization. We recognize organizations face different challenges, which can include geographic location, size of organization, services provided, and local labour market pressures, to name a few.

This Guide includes a number of tools, best practices and policies from the sector and beyond. These can be copied or adapted to meet your needs. While each organization may address their succession planning differently, we would like to emphasize the following best practices:

- A. Talent management and succession planning is a shared responsibility in organizations. Buy-in and support must occur at the most senior level and it should be known throughout the rest of the organization.
- B. There are 5 main components of the succession planning process:
 - 1. Identifying Critical Positions
 - 2. Identifying Key Competencies
 - 3. Assessing People
 - 4. Creating Development Plans
 - 5. Evaluating People

In 2011, Statistics Canada census data showed the working-age population (those aged 15 to 64) represented 68.5% of the Canadian population.

For the first time there were more people, aged 55 to 64, typically the age group where people leave the labour force, than aged 15 to 24, typically the age group where people enter it. Among the working-age population, 42.4% were in the age group 45 to 64, a record high proportion.

It is also important that, as a sector, we are all using consistent terminology and we have defined succession planning and talent management as the following:

- **Succession Planning:** A strategic planning exercise that seeks to ensure that an organization has a pool of highly skilled and talented employees available and ready to step into senior leadership and other critical roles should the need arise.
- **Talent Management:** A documented process for developing high potential employees for positions for which they have an interest and are well suited. This process ensures the “right” employee is ready to assume the “right” role at the “right” time.

In addition to this Guide, the Developmental Services Core Competencies Dictionary is an excellent resource to incorporate your organization’s succession planning and talent management process.

This Guide focuses on positions within agencies, excluding the Executive Director/C.E.O. The Executive Director/C.E.O. position will be covered in a similar Guide for Boards of Directors.

We hope you find this Guide useful and encourage you to share this with people in your organization as you begin or continue your succession planning and talent management journey.

1. Introduction

Background:

The Developmental Services Human Resources Strategy (**DS HR Strategy**) is a partnership between the Ontario Ministry of Community and Social Services and the Provincial Network on Developmental Services. The **DS HR Strategy** was launched in 2008 with a vision to professionalize the sector and ensure the best quality of supports for people with developmental disabilities in Ontario.

The goals of the DS HR Strategy are:

Increase the pool of qualified developmental services professionals

Ensure consistency in education, training and professional development in Ontario's Developmental Services Sector

Provide opportunity for a variety of career paths for developmental services professionals

Enhance management expertise

To achieve these goals, the **DS HR Strategy** Steering Committee oversees four sub-committees: Provincial **Core Competencies** Implementation Committee; Marketing and Communications Committee; Talent Management and Succession Planning Committee; and Workforce Development and HR Practices Implementation Committee (WDHRPIC).

The Talent Management and Succession Planning Committee has the mandate to develop a succession planning framework for the Developmental Services sector in Ontario. In an effort to meet this mandate, the Committee has developed a Talent Management and Succession Planning Guide for Agencies to use, as well as a guide directed at Boards of Directors. The first

step in preparing for this Guide was to survey the Developmental Services Sector on Succession Planning practices and resources being used by Developmental Service agencies.

This survey was conducted in December 2013 with the purpose of understanding if organizations have a formal succession plan in place, review what tools and policies are currently existing and assessing if agencies are aware of this pressing human resources challenge. Ninety agencies responded with answers coming from Executive Directors/C.E.O's, Human Resources Directors and Managers. This guide builds on the survey findings, the resources supplied to us by organizations in the sector, researched best practices and other resources on this topic.

Introduction to the Guide

This Guide operates with the following in mind, the Developmental Services sector has four main challenges:

- 1 We continue to experience an increased demand for our services from persons with developmental disabilities and families.
- 2 We continue to experience funding challenges to meet the demand for service.
- 3 We continue to face challenges in attracting and retaining talented people at all levels.
- 4 The age demographic of many key leadership positions in many organizations shows an imminent risk of losing many leaders due to retirement.

This guide seeks to help organizations address challenge #4 and offers advice on how organizations can ensure highly competent people are ready to lead our organizations in the future.

The 2013 Developmental Services survey on Talent Management and Succession Planning showed that while talent management and succession planning occurs throughout the sector in various forms, there is a clear need and desire for succession planning and talent management resources to be developed for the Developmental Services sector.

The **DS HR Strategy** has identified the need for raising succession planning and talent management as a key Human Resources challenge for the sector. The **DS HR Strategy** has created this Guide as a tool for organizations to use to assist and provide guidance in addressing succession planning and talent management in your organization.

This Guide provides a broad framework to assist Developmental Service organizations to identify critical positions and potential successors for these roles within your organization. The Guide also includes sample templates, which are provided as a resource to help your organization when considering how to approach succession planning and talent management.

In creating this Guide, we are aware that approaches to succession planning and talent management will vary by organization and may include factors such as the organization's size in terms of budget, number of staff, geography, services and available infrastructure to support this management responsibility. This Guide is offered as a resource for consideration and hopefully provokes healthy discussion on what might work best in your organization. We are not recommending one approach for all organizations.

In this Guide, you will find what we believe are some best practices, which we have found in the sector and beyond the sector.

Benefits of Succession Planning

The benefits of good succession planning include:

- A means of ensuring the organization is prepared with a plan to support service continuity when the Executive Director, senior managers or key people leave
- A continuing supply of qualified, motivated people (or a process to identify them), who are prepared to take over when current senior staff and other key employees leave the organization

- An alignment between your organization's vision and your human resources that demonstrates an understanding of the need to have appropriate staffing to achieve strategic plans
- A commitment to developing career paths for employees which will facilitate your organization's ability to recruit and retain top-performing employees
- An external reputation as an employer that invests in its people and provides opportunities and support for advancement
- A message to your employees that they are valuable

The absence of a succession plan can undermine an organization's effectiveness and its sustainability. Without a succession planning process, an organization may not have a means of ensuring that the programs and services that are crucial to its operation are sustained beyond the tenure of the individual currently responsible for them.

2. Succession Planning and Talent Management

DEFINITIONS

- **Succession Planning:** A strategic planning exercise that seeks to ensure that an organization has a pool of highly skilled and talented employees available and ready to step into senior leadership and other critical roles should the need arise.
- **Talent Management:** A documented process for developing high potential employees for positions for which they have an interest and are well suited. This process ensures the “right” employee is ready to assume the “right” role at the “right” time.
- **Successors:** Current employees of an agency, who consistently exceed expectations in their current role, have the potential to develop into a more senior role and display core competencies linked to a more senior position.
- **Critical Positions:** Also known as "key positions", critical positions are those which, if left vacant, could create operational, reputational or financial risks or compromise the progress of strategic priorities or business performance. Critical positions are often important to the long term success of a strategic plan (3-5 years) or short term success of a key project or strategic objective (6 months-2 years). These roles are the targets of a succession plan.

Examples of critical positions may include Executive Director/CEO, Operations Director, Finance Director, Human Resources Director and other positions.

- **Short Term Absences:** Absences which are short in duration.
- **Permanent departures:** An absence from which there will not be a return to employment, generally due to either retirement, resignation, medical problems or terminations.
- **Planned Absences:** A foreseen absence beyond 3 months duration. The return date can be defined (such as a maternity leave) or an absence with no return date such as a retirement.
- **Unplanned Absence:** An unforeseen absence often with little or no notice. These absences are often due to illness and are typically less than 6 months.

Key Roles in Succession Planning



For Succession Planning to be most effective, it should become a process that all employees in the organization are aware of and understand.

The following provides a suggested responsibility for various roles in the organization.

Board of Directors

The Board should be responsible for the succession planning for Executive Director/C.E.O position. Succession planning must begin at the Executive Director/C.E.O. level with the Board taking accountability and ownership of the process. This can include identifying the **core competencies** required to lead the organization in order to achieve its mission and vision and execute its strategic directions. The Board should be aware and regularly updated on the potential pool of senior leaders in the organization. The Board needs to embed succession planning as part of their regular meetings, on an annual basis or more frequently if required. The Board should also ensure the Executive Director/C.E.O is held accountable for Succession Planning for all other critical positions in the organization.

Executive Director / C.E.O.

The Executive Director/C.E.O. is the ultimate owner of the organization's succession plan and talent management program for all positions that report to the Executive Director/C.E.O. and other identified critical positions. The Executive Director/C.E.O. should personally participate in the process including regular reviews and updates for the organization's succession plan. The Executive Director/C.E.O. should act as a champion or ambassador to the process, including showing the organization's commitment to the process and ensuring Succession Planning and Talent Management become embedded in the organization's culture. The Executive Director/C.E.O. should also provide the Board regular updates and act as a resource for the Board.

Senior Management

Senior Managers should also play a key role in ensuring Succession Planning and Talent Management become part of the organization's culture and it should be a key accountability for senior managers and other managers in the organization. These responsibilities can include identifying high potential employees, conducting meetings with identified employees, assessing employee skills, knowledge and competency levels and assisting in the creation and execution of individual development plans for the high potential employees. Senior Managers should have regular succession planning and talent management update meetings with the Executive Director/C.E.O. and Human Resource Director.

Managers

Management staff (can include Supervisors/Directors) play a very important role by liaising between senior management and direct support employees. This can include participating in talent review meetings, helping to identify potential talent, understanding employees' future career goals and aspirations. Managers can also ensure effective performance appraisals occur where individual development plans are created to assist potential talent in developing to the required competency levels for career growth, as well as evaluating employee performance and progress on individual development plans. Managers should also participate in talent review meetings with senior management to help identify potential talent and update on individual development plans.

Employees (Direct Support Professionals)

Employees interested in career growth need to take ownership of their future by seeking out opportunities for skill and knowledge growth. This can be done by learning about the critical positions in their organization and having discussions regarding their interest with their manager. Employees should feel able to discuss their career aspirations and interests with their manager and develop mutually agreed on individual development plans as part of the performance appraisal process. Employees should also seek out professional development opportunities in partnership with their manager.

Human Resources

Human Resources and specifically, the Human Resource Director should administer the organization's Succession Planning and Talent Management Program. Some of the main duties should include:

- In partnership with Senior Management and the Executive Director/C.E.O, developing the Succession Planning and Talent Management toolkit for use in the organization
- Ensuring the Performance Appraisal system in the organization supports the Succession Planning and Talent Management Program
- Tracking and measuring progress of talent management (databases, reports etc.)
- Facilitating talent review meetings with relevant stakeholders
- Assisting management in evaluating potential talent
- Providing templates, tools, etc. to assist in the process
- Assisting the Executive Director/C.E.O. in leading the Succession Planning and Talent Management Program.

Succession Planning Step-by-Step

1. Create a visible commitment to succession planning and talent management through the organization.

2. Develop succession planning and talent management policies and procedures.

3. Develop a communication plan to promote, inform and sustain succession planning and talent management.

4. Identify critical positions in the organization.

5. Create a career progression model for the organization connected to talent management strategies.

6. Conduct risk assessment for potential departures, vacancies and related personnel changes.

7. Identify potential candidates and solicit employee interest in professional development.

8. Create a succession map.

9. Engage potential successors in professional development activities.

The executive director/CEO in partnership with the chief HR Director should drive organizational commitment, but commitment needs to extend throughout the organization, including the level of direct support professionals.

While this step should include traditional supervisory career ladders, organizations should consider alternate direct support professional career growth pathways, which outline career development opportunities, but are not focused on traditional supervisory hierarchies.

A succession map charts possible succession pathways by identifying specific employees and their development into specific roles.

Communicating the Plan

The process of talent management should be formalized and broadly communicated and rely on the **DS HR Core Competencies** to help identify and develop employees to assume management and senior management positions. Succession planning is most effective when it is integrated with the agency's performance management system. The most effective succession planning emphasizes more than just the Executive Director/C.E.O role.

It is also important that potential successors who are identified as part of the succession planning process understand that there are no guarantees that a promotion will happen at any specific time and that consistent superior performance is a necessity in order to continue on the succession path.

Best Practices

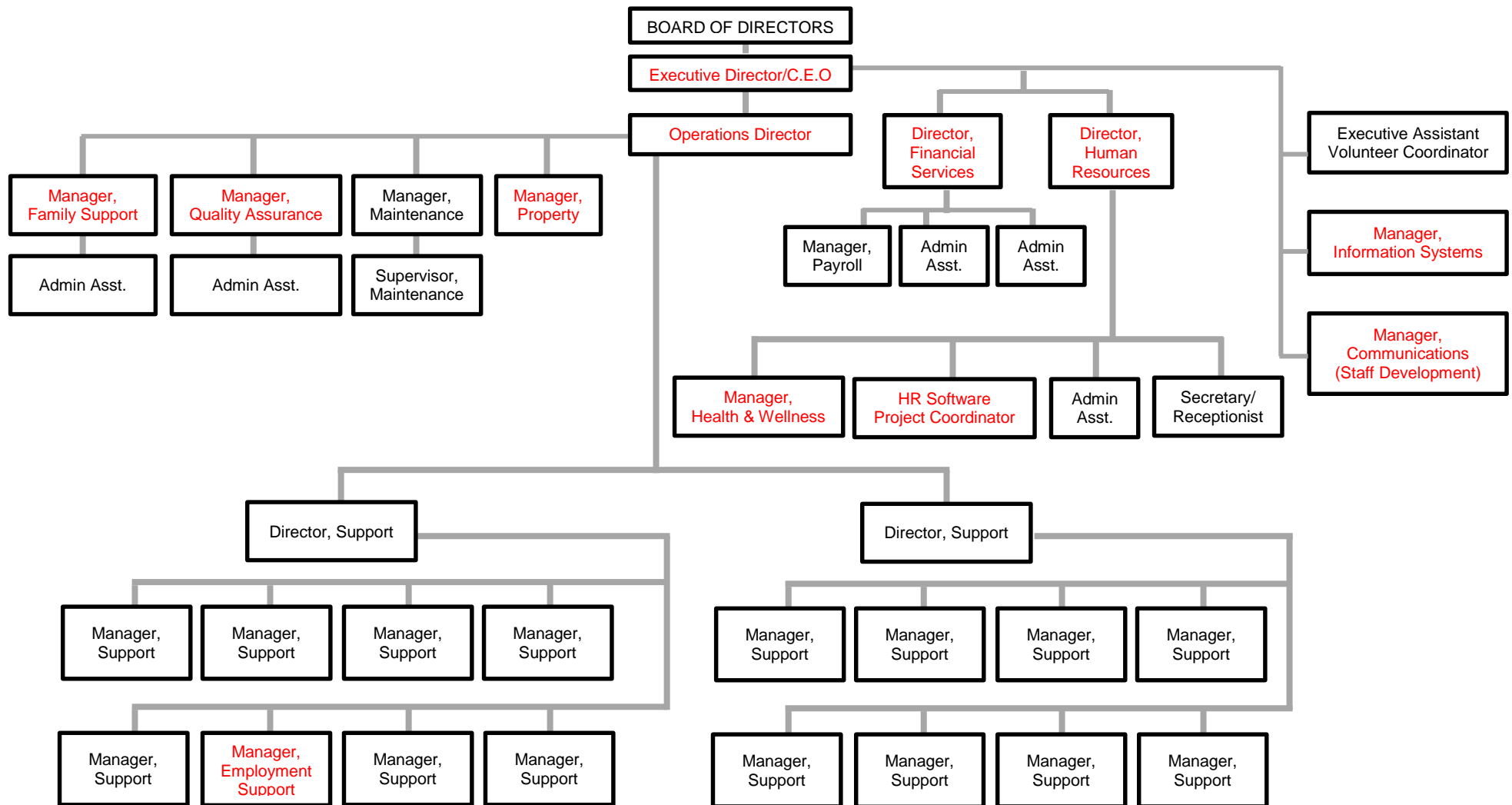
While broad communication around agency talent management and succession planning policies help to ensure support and interest from all areas of the agency, careful consideration must be given to which elements of the model should be shared and which should be kept confidential. It is recommended that the general talent management and succession planning policies and procedures be shared broadly, while specific information relating to employee development plans around potential succession to key positions should only be shared at the senior management and board level.



Key Roles in Succession Planning and Talent Management



CRITICAL POSITIONS



Succession Planning for Critical Positions

The departure of someone with a critical role within an agency can create tremendous stress as well as operational, reputational or financial risks if it is not thought out and planned for ahead of time.

Succession planning procedures for Critical Positions should be created to address both temporary and permanent absences.

Identifying Critical Positions

It is the role of senior management to identify and plan for short and permanent absences in critical positions. The senior management team must ask itself which positions would need to be filled almost immediately to ensure the organization continues to function effectively. (See definition for critical positions).

Short-term absences of critical positions

As part of an emergency succession planning strategy, each person occupying a critical position must identify and document their key job functions or critical duties. For each critical duty, a current employee must be identified and trained to perform this function during a short-term absence. The potential reassignment of critical duties should be documented as part of the plan. Generally, short term absences beyond 3 months require a more formalized response.

(See Appendix for a sample template)

Best Practice

The exercise of defining and reassigning critical duties may require some strategic rethinking of current organization structures and positions. This may include additional formal education of some current employees for the completion of some duties (e.g. formal accounting/bookkeeping courses).

Permanent Departures of Critical Positions

As part of the talent and performance management process, senior management needs to work to identify and develop potential internal candidates for critical roles.

Best Practices

By embedding **Core Competencies** into the talent management process, required competencies for key positions can be identified and developed in potential successors well in advance of the vacancy in a critical position.

The identification of potential successors should include a combination of performance reviews, assessments of employees' potential using a competency framework, and readiness (including practical readiness, aspiration and engagement) of identified employees.

Job Posting Requirements

An integral part of the succession planning process involves vacancies and job postings. The organization's succession plan will include a defined successor(s) who is ready or is developing towards a specific role(s) even though the role is not vacant. The defined successor(s) is assessed against the specific requirements of the role(s) as part of the ongoing succession planning process. Given this ongoing, fluid process, the organization needs to decide whether or not a critical position is posted as a vacancy. The decision to post a critical position has several elements for the organization to consider. These may include:

- The organizational policy for postings
- Past practice
- Desire to offer a fair competition to any qualified candidates
- Whether the candidates are internal or external
- Whether there is an identified successor ready for promotion
- Whether there are multiple successors ready for promotion to the critical role

Should there be an identified successor ready for promotion outlined in the organization's succession plan, it could be suggested that a job posting is not required, assuming the organization's succession plan has clearly identified this as an option and that it has been clearly communicated to all levels of the organization. One size does not fit all; each organization will have unique needs and solutions.

If an internal candidate is ready for promotion and the organization is comfortable without posting the job, then implementing the succession plan may only require a meeting with the identified successor to ensure readiness and willingness to move into the new role and to clarify expectations of the role. As noted in the preceding paragraph, ongoing, effective communication with staff is a key component of Succession Planning and Talent Management. Without it, agencies could run the risk of being perceived by staff as supporting unfair recruitment/selection practices.

If there are multiple candidates that are ready for promotion to a specific role, then an internal recruitment process will still be required to determine the best candidate for the vacant role.

Transition into the Role

There needs to be formal transition plan developed for candidates entering a critical position. The following items should be considered as part of the transition/orientation process for the successor:

What is talent management?

Despite the growth of attention and interest in talent management, the term remains somewhat ill-defined in practice. At a basic level, talent management involves processes designed to develop staff and managers. In this way, talent management complements general workforce training and development.

Talent management programs involve a more individualized, targeted and differentiated approach to development. Specifically, the differentiated nature of talent management programs starts with the premise that not all employees have the desire or capacity to develop into critical leadership roles in the organization. Rather than a general effort to provide broad training for all employees, talent management requires specific, competency-based training programs to develop high potential managers and direct support professionals into critical positions.

Building a talent management program

Starting a talent management program is an essential part of succession planning. The following steps build on the policies and practices for succession planning discussed in this guide:

1. Demonstrate broad organizational commitment to talent management

just as with succession planning, executives, managers, board members, front line supervisors and direct support professionals all have a role in talent management. Given the time and resources required to effectively build a talent management program, broad organizational commitment is needed. One way to start is to begin as part of the organization's strategic planning process by clarifying the mission-strategy-people connection. Talent management is founded on the organization's mission and vision. Next, empower a work group to develop recommendations on leader development and talent management.

2. Succession planning should drive the talent management program

The activities outlined in the succession planning steps (page 9) are a prerequisite to building a talent management program. Start by identifying key positions and the leadership characteristics needed for these critical roles. Then assess the current leadership capacity of individual employees, highlighting the strengths and growth zones. From there, design targeted

leadership development programs to enhance the core competencies needed to move into the key roles.

3. Align human resource practices through the use of core competencies

The **Core Competencies** model developed by the **DS HR Strategy** has created the foundation for leadership development in the sector. The Core Competencies Development Resource Guide includes a diverse collection of developmental tools to build on. Reinforce the core competencies development program by aligning performance management policies and practices. In addition to these personal development activities, a robust talent management program should promote a culture of mentoring by making talent management part of every leader's job.

4. Make talent management / leadership development a central part of annual operational planning

Succession planning and talent management are not one-time tasks, but require constant renewal. Develop and implement an annual bench strength and talent-review process as outlined in step #2 above. Changes in the environment, such as the growth of Passport Funding, may change the nature of critical positions in the organization. Likewise, changes in personnel will mean a changing pool of high potential employees.

5. Expand development and training opportunities for existing and emerging leaders and staff

Organizations should not expect existing training and development programs to sufficiently drive talent management. For example, creating 'stretch' opportunities can help drive development and reveal leadership potential. Given the natural challenges associated with retaining emerging leaders, it is important to balance employee-employer interests in creating advancement opportunities. Rather than leaving career advancement to the unspoken message of "wait your turn," organizations should work with emerging leaders to identify opportunities to put the developing talent to work.



4. Policy and Procedures

The following are a set of policy/procedural suggestions covering absence of the identified Critical Positions, as well as some considerations for best practices.

Policy - Succession Planning

This statement should outline that while changes in critical positions are inevitable, a well-planned succession planning process, including talent management, can maintain operational stability, maintain clear and open communication and ensure a talent pool is ready to fulfill critical roles. It should emphasize the importance of formalizing the process early and providing a continuum of talent management and succession planning over time rather than treating it as an event.

Absences which trigger formal succession planning procedures include temporary planned absences (such as a long vacation, approved personal leave or a planned short term medical leave), temporary unplanned absences and long term permanent planned and unplanned absences.

Critical Positions - Unplanned Departures and Temporary Leaves

Scope

This section covers considerations for formally managing the absence of identified critical roles **on a short term or interim basis** for both planned and unplanned temporary and permanent departures.

Notice

In the event of a short term or permanent absence, the Executive Director/C.E.O or Senior Management should immediately inform the Board President of the absence. Upon notification of a planned or unplanned departure, the Executive Director/C.E.O should immediately convene a meeting to determine how interim leadership will be handled.

Considerations

Unlike longer term appointments with both short term and unplanned permanent departures, it is often necessary for the Executive Director/C.E.O to appoint an internal interim replacement, hire an external Interim replacement or alternately to formally split up the priority /key functions of the critical role (i.e. leadership and strategic development, service delivery, financial management, human resources management and partnerships). This assists the agency to effectively function through the interim period until the person returns or a replacement is hired.

Best Practice

It is the Executive Director's/C.E.O responsibility under due diligence to be prepared for and ensure continuity of operations during any short term and unplanned leadership absence.

Good emergency succession planning will identify interim procedures and responsibilities ahead of time including the identification of the Interim/Acting replacement, where possible, or the formal workload reassignment. Early preparation provides clarity and accountability and allows for continued organizational stability and progress during the absence or hiring period.

Role of an Interim/Acting replacement

Unless otherwise specified, the interim/acting replacement person is vested with all the responsibility and authority of the critical role including strategic planning, financial management, service provision, risk management and contractual agreements.

Compensation

Regardless of the interim leadership measures, compensation of the person/people assuming the critical role should be considered by the Executive Director/C.E.O in keeping with the increase in responsibility, as well as length of the interim appointment. The Executive Director/C.E.O should use the Human Resources Director as a resource when considering this element.

Communication Plan

Whether the absence is temporary or permanent, any formal interim coverage arrangements for the Critical Position should be communicated in writing, as soon as possible, by the Executive Director/C.E.O to:

- The main funder(s), as appropriate;
- Relevant community partners, as appropriate;
- Other stakeholders, as appropriate

Length of Notice

This statement should outline the ideal notice period for each critical role. While the notice period serves as an ideal, planned retirement vs. resigning to pursue an alternate position can affect the length of notice.

Best Practice

For critical roles (excluding Executive Director/C.E.O) a notice period of no less than two months is important to ensure the hiring process is complete. Additional time can allow for the added benefit of orientation with the outgoing person. Notice should be in writing.

The announcement of a permanent departure of a person in a critical role provides an opportunity for the Executive Director/C.E.O, with assistance from senior management to consider alternatives such as agency restructuring, mergers, or sharing of positions with other agencies. Depending on the governance model, the Board may also need to be part of this discussion.

5. Conclusion

Succession planning and talent management is a critical management process that can help ensure your organization is well-positioned and prepared with competent and effective leaders for the future.

While this Guide offers much information, it is not meant to be a prescribed process to follow, but rather to serve as a support to organizations in addressing succession planning and talent management. We recognize each organization is unique and by using this information, you may tailor an approach that best meets your agency's needs.

We hope this Guide is useful and valuable and when coupled with the Developmental Services Core Competencies Dictionary, you will be well on your way to ensuring your agency is in great shape for the future.

6. Resources

Appendices

- A. Community Living Wallaceburg and Ottawa Rotary Home Sample Succession Planning Policies and Procedures
- B. Succession Map Template
- C. VALORIS for Children and Adults of Prescott-Russell Talent Management and Succession Planning Case Study
- D. Emergency Succession Planning Template for Critical Roles
- E. Tool for identifying Critical Positions and Risk Assessment (created by Community Living London)

All resources listed in the Appendix can be accessed on the DS HR Strategy website at www.ontariodevelopmentalservices.ca under the DS HR Strategy tab.

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