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From Brussels Sprouts to Sugar Cookies: Transform Your Succession Plan

PRESENTED BY

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Your Instructor



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Agenda



Learning Objective

By the end of this course, you should be able to:

- Identify workforce resiliency risks using a risk-based assessment approach.



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The Now



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The Now and the Public Sector as a Whole

1

Recruitment

Recruitment is less challenging, and few governments reported needing to reopen positions due to insufficient number of applicants.



2

Succession

Governments reported succession planning as important, but 61% reported not having any such elements in place.

Finance and Audit

Shortage

- There is a talent shortage in entry-level accounting and audit positions.

Salaries

- Government accounting and auditing standards are specialized, yet salaries are below those in the private sector. This makes it harder to recruit and retain employees.

Sources

- Check out the [Renewed Investment Needed to Ease Accountant Shortage in the Public Sector, Report Finds.](#)

Poll 1: Succession Planning

How is succession planning executed in your organization?

- We don't do it
- Leadership doesn't believe in it, so we don't do it
- We see the need for it, but haven't executed the next steps
- Some departments have implemented steps, but it is ad hoc across the organization
- We execute a plan with steps conducted throughout the year or annually
- We need help!



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Ditch Succession Planning



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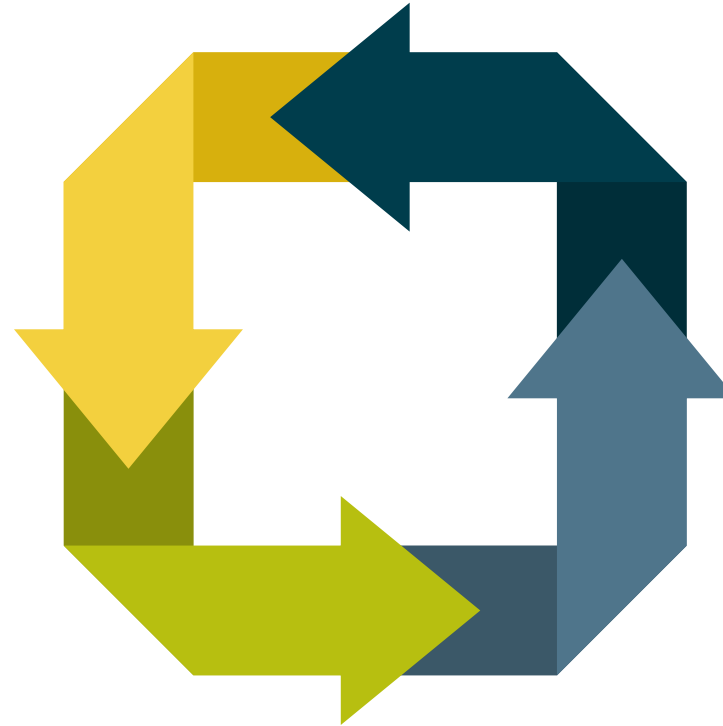
Switch to Resiliency Planning

Succession Planning

Succession planning is a loaded term, often triggering resistance in the public sector.

Misunderstood

It is commonly misunderstood to mean identifying and preselecting a single successor for leadership roles.



Reframe

Like serving Brussel sprouts with cheese and butter, you can convince some people. Others remain disengaged, no matter how it's presented.

Resiliency

The real objective is **workforce resiliency** by building shared knowledge and skills to reduce operational disruption.

How Workforce Resiliency Planning is Different Than Traditional Succession Planning



Poll 2: The Public Sector

What level within the public sector do you work?

- Individual contributor
- Supervisor
- Manager
- Executive management
- Board, council, or committee member
- Other



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The Approach: Risk-Based Assessment



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A Workshop Approach with Department Leadership

Step 1: 3 x 4 x 3 Exercise

1

What are the primary soft skills needed at the four position levels?

2

What are the primary technical skills needed at the four position levels?

3

Where are the gaps in the soft and technical skills?

Step 2: What are the Obstacles?

Governance	Establishing workforce resiliency planning as an organizational priority, supported by appropriate budget and time resources. This responsibility rests with the board, executive, and executive management teams.
Framework	Aligning HR resources with workforce resiliency planning priorities and continuously gathering feedback to improve execution and adapt to strategic needs. This is primarily the responsibility of the HR department.
Implementation	Executing the workforce resiliency plan through collaborative recruitment efforts, employee coaching, documentation, cross-training, and fostering a culture of growth and continuous improvement. People managers are primarily responsible for implementation.

Step 3 — A Bonus Step — Assessing Vacancy Impact

Why this matters

- Identifies positions that pose the greatest operational, financial, and strategic risk.
- Supports prioritization of workforce resiliency actions in Step 4.

Assessment lens

- Likelihood of vacancy
- Difficulty in filling
- Impact on finances and long-term goals
- 1-3 month vacancy



Reach out to MGO for a position risk assessment matrix!

Step 3: Assessment Criteria and Scoring

Position vacancy risk	Average vacancy rate over the past three years
Retirement eligibility forecast	Number of employees eligible to retire within 5 years, also assessing adjacent positions above and below
Time to hire	Average time-to-hire over the past three years
Operational impact	Effect on daily core functions, single-incumbent or specialized knowledge
Financial impact	Influence on revenue, financial management, or oversight
Strategic impact	Alignment with department and organization five-year goals

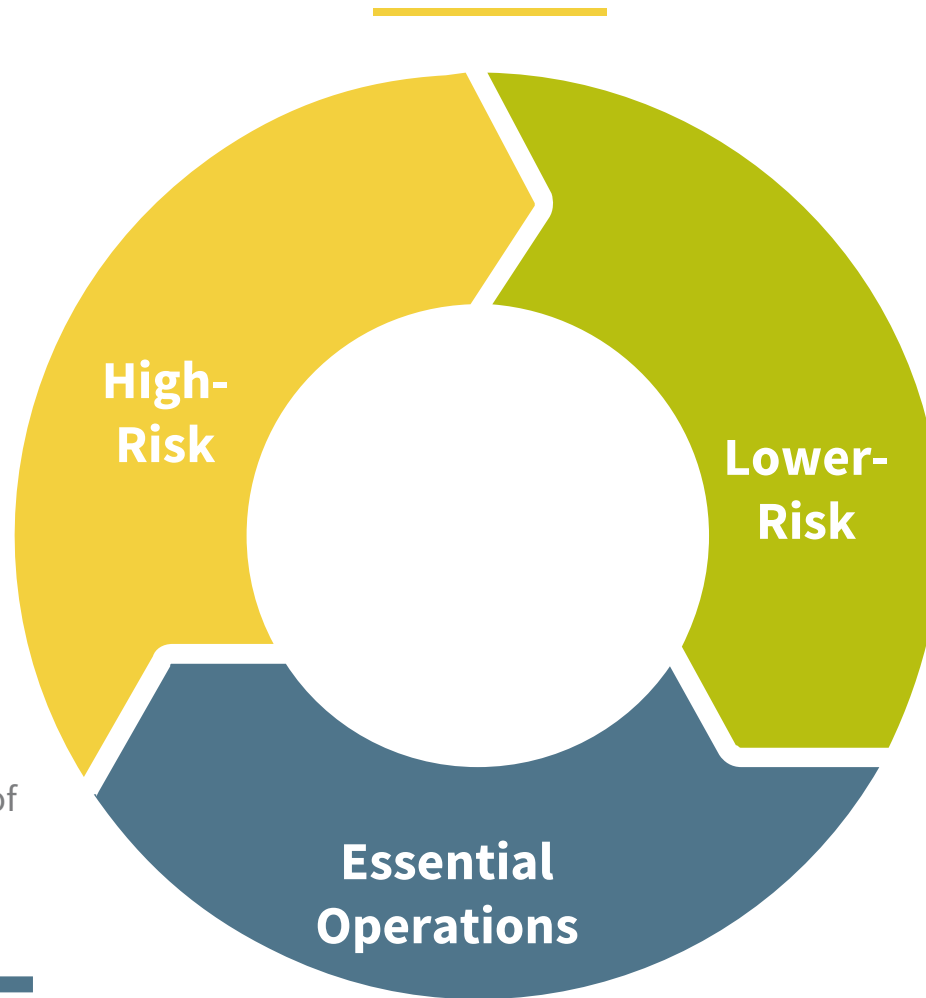
Scoring and results

- Score each criterion: **Low (1), Medium (2), and High (3)**
- **Top 15% of total scores identify highest-risk positions**

Step 4: Operations through Standard Operating Procedures (SOPs)

Start with the responsibilities of the high-risk positions identified in Step 3 in year one, specifically any areas with single points of failure. Within the SOPs, identify backups and start cross-training them.

If you don't complete Step 3, start with essential operations and single points of failure. This will likely uncover many of the responsibilities of the high-risk positions.



Continue with lower-risk operations in future years.

Step 5: Develop Transition Plan Documentation

For every position, have employees complete a transition plan document.

Ideally, this is updated annually, then revisited when an employee leaves. The key is to identify knowledge redundancy, especially for special projects.

Reach out to MGO for a copy.

Conclusion

Workforce Resiliency Planning		Succession Planning
Organization-wide and position level emphasis	versus	Individual employee emphasis
Fills gaps in soft and technical skills across the organization		Prioritizes training for select employees
Removes the idea of essential positions with high risk		Diminishes non-essential position's contribution

Poll 3: Workforce Challenges

Which resources are you most interested in receiving from MGO?

- Position risk matrix
- Position transition template
- Retirement forecast
- Something else
- Nothing for now

**ANY
QUESTIONS?**

Poll questions: Join [MGOcpa.cnf.io](https://mgocpa.cnf.io)



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Poll 4: Areas of Interest

Would you like to hear more from MGO on this topic or others?

- Yes
- No
- I need more information