



CAO Succession Planning

ABOUT CAO SUCCESSION

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Selecting a new Chief Administrative Officer (CAO) is one of Council's most important responsibilities and an important way that Council can influence the municipality's future. For many councilors dealing with CAO succession may be a new or at least infrequent experience. It is a good idea to have a plan mapped out for identifying and developing the next CAO, particularly in the event of a sudden departure of the current incumbent, for example in the event of a disabling or terminal accident or illness.

INITIAL CONSIDERATIONS

1. What succession-related factors should be on our radar? (E.g. what strengths fit our municipality's needs and requirements, what characteristics are needed to navigate our current environment, etc.?)
2. Is our municipality involved in developing internal CAO succession candidates or will we have to look outside?
3. If the answer to #2 is outside, should we be giving the current CAO a goal of developing internal candidates? Do we have enough management employees to make that a realistic goal?
4. How should we monitor the external talent pool? (E.g. identifying high performing similar municipalities, listening to councilors from those at meetings and conventions talk about up and coming talents in their organizations, etc.)
5. Do we have a common understanding of acceptable limits to our CEO's abilities?

PLANNED SUCCESSION

6. What is our role as Council in choosing the new CAO? Will we have a Search Committee, use external search consultants, and if not who will flesh out the details of the search process?
7. What does our "ideal" CAO look like? What are our municipality's leadership requirements?
8. How do we determine the "readiness" of internal candidates?
9. Do we need to look for candidates externally?
10. Should we engage an executive search firm?
11. Should we involve the existing CAO in the process and, if so, how?
12. How do we minimize the risk of picking the wrong candidate? (CAO leadership profile, compensation package, efficient scheduling of the process, planned interview questions)

directed at our key areas of concern, face-to-face debriefing after each interview, at least one interview with entire Council, reference/background checking)

13. Who can help us reduce the risk inherent in CAO succession decisions?
14. What should our CAO selection communications plan look like?

ENSURING THE NEW CAO'S SUCCESS

15. How do we successfully integrate the new CAO into our organization and understand its culture?
16. How do we help the new CAO establish the right relationships with our stakeholders?
17. How do we track how well the new CAO is integrating? (acceptance in the organization, alignment with Council's strategy, credibility with stakeholders, contribution to the municipality)
18. What is Council's role in coaching and developing the new CAO?

SPECIAL SELECTION CIRCUMSTANCES

19. What should we do when faced with a sudden, unexpected CAO vacancy? (e.g. retain an experienced, perhaps retired, municipal manager as an interim CAO while the selection process is implemented)
20. What should our communications plan look like in this circumstance?