



citycounty insurance services

# MEMBER SPOTLIGHT

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## LOOKING TO THE FUTURE: HR STRATEGIES AT CIS

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### **Continuity and Succession Planning**

When Patrick Priest, Executive Director of CIS Oregon was hired, his pool had recently completed a succession-planning study. One outcome of the study resulted in CIS hiring Patrick as the “Deputy Director/Executive Director Designate” with enough overlap between the outgoing Executive Director and Patrick for a smooth transfer of knowledge.

The approach of budgeting Succession FTE worked so well, that Patrick still uses it for other positions. Succession FTE has helped and will help, as CIS loses long-term employees to retirement. Out of about 70 employees, in the past two years, seven employees have retired; in the next 1-2 years, CIS estimates that 10-12 more employees will retire.

The need to plan and prepare for upcoming retirements became especially apparent last year when CIS conducted a continuity and succession planning project. In addition to reviewing job descriptions, CIS asked employees what information they “have in their heads” that someone performing the job would need to know, how long it would take a new person to learn their job, what external relationships are needed to perform their job, and if written instructions for how to perform their job were in place. Supervisors and managers then reviewed their employees’ responses, identifying how they would get a person’s job duties done in the short and long-term. Some of the project outcomes included discovering that even if experienced new hires replace retiring property/liability claims consultants, it takes 3-5 years to learn how to successfully manage public-sector pooling claims, and for some job descriptions, the long-term replacement plan might include changing how some services are delivered.

### **Recruitment**

With the information gathered as part of the continuity and succession planning project, the move to a hybrid-remote workforce that started during COVID closures, and the expectations of today’s applicants, CIS realized that having Succession FTE would not be sufficient to fulfill future staffing needs. CIS is therefore on the road towards new and improved recruiting strategies.

One challenge to recruitment is the lack of pooling brand identity: few in the job market know

about the competitive compensation package some pools offer or the personal satisfaction pooling employees feel when helping members. Most, in fact, have never even heard of public-entity risk pooling.

CIS looks forward to collaborating with other organizations through the newly created NLC-RISC HR Online Community and roundtable meetings. CIS will also add NLC-RISC and AGRiP job board links to their pool's career pages.

CIS has already expanded where job ads are placed: the HRIS vendor CIS uses, has a feature that makes it easy to post to multiple job boards, including DiversityJobs.com

Examples of other recruitment strategies CIS plans to use are as follows:

- Re-evaluating which positions need a four-year degree
- Partnering with diverse organizations, including offering scholarships to attend CIS conferences, and raising awareness of the NLC Mutual diversity internships
- Searching applicant databases and use list services to attract "passive" candidates
- Participating in job fairs
- Continuing use of the online recruiting HRIS vendor's software that supports smart phone applications and chatbots
- Building relationships with universities and community colleges, which may lead to internships

As part of the recruitment strategy, CIS is not overlooking the development of employees. The organization created an internal leadership academy and added periodic trainings based on leadership academy content. Additionally, most CIS staff receive an annual training budget that can be used to attend pooling, insurance, and risk-specific conferences and training. Examples of staff development activities include attending the NLC-RISC conferences and participating in the RISC/AGRiP/CAJPA Pooling Academy.

### **Onboarding**

Shortly before COVID office closures, CIS implemented the HRIS vendor's "Onboard" software. The software positioned CIS to use MS Teams for onboarding. Because new hires now complete forms online, we have more time to talk when meeting with them rather than focusing on completing a large volume of paperwork.

Going forward, CIS will maintain job descriptions, focus on skills needed to perform job duties, develop, and train employees, and cultivate unity between the mission and internal culture by:

- Enhancing employee engagement to improve organizational culture
- Inviting employees to participate in workgroups focusing on connecting and engagement
- Improving the integration of internal IT systems to gain more efficiency
- Preparing succession and business continuity plans for all business units
- Fostering collaboration between business units
- Finding the right hybrid-remote balance

*Feel free to contact Patrick Priest, CIS Executive Director, or Janie McCollister, CIS HR Manager, about information shared in this article.*