

**BLUE WATER DEVELOPMENTAL HOUSING, INC.
POLICIES AND PROCEDURES: EMPLOYEE INFORMATION**

SUBMITTED BY: Kathleen Swantek	DATE SUBMITTED: 06/23/16	SECTION: Human Resources
BOARD APPROVED ON: 08/08/18	DATE REVISED: 06/20/18, 08/12/2026	SUBJECT: Succession Planning Process
ANNUAL REVIEW BY EXECUTIVE DIRECTOR: 06/20/18, 08/22/19, 11/19/19, 11/20/2021, 08/12/2026		POLICY #: ED-040
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I. APPLICATION

The provisions stated herein shall apply to all employees of Blue Water Developmental Housing, Inc. (BWDH).

II. POLICY

It is the policy of the organization to establish a management succession planning process for employees.

The organization believes that the process for leadership development must start at the time an individual is hired as an employee. Therefore, the orientation checklist will include advancement in the organization as an item for discussion. The program supervisor will note those employees who express interest in advancing and evaluate their potential. It is not a mandatory program.

Succession planning ensures continuity of high-quality services, organizational stability, and alignment with BWDH's mission.

The succession planning process is guided by the principles of equity, transparency, inclusivity, development focus, and accountability.

Succession planning includes identifying potential successors, assessing readiness, and supporting development through structured training, mentoring, and documented growth activities.

III. NOTIFICATION/PROCEDURE

WHO

DOES WHAT

Human Resource
Manager/Executive Team

1. Annually review the organizational chart to identify critical roles essential to operations, including positions with high turnover, specialized skill requirements, or significant impact on service delivery.

Program Supervisor /
Employee / Division Director

2. Discuss advancement opportunities during orientation and ongoing supervision. Employees may self-nominate using the Candidate

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Program Supervisor / Division
Director

Program Supervisor / Division
Director / Human Resources
Manager

Executive Team / Division
Director

Interest Questionnaire. Supervisors may recommend employees who demonstrate consistent performance, leadership potential, and interest in advancement.

3. Evaluate nominated candidates using the standardized competency rubric, performance history, and supervisor observations. Assign a readiness category: Ready Now, Ready in 1–2 Years, or Ready with Significant Development.
4. Create a tailored development plan for each candidate. Plans may include leadership training modules, job shadowing, stretch projects, mentorship, and other development activities based on identified competency needs.
5. Monitor candidate progress quarterly using the tracking form. Document development activities, feedback, and readiness updates. Attach the Leadership Development & Succession form to annual performance evaluations.
6. When a position opens or a transition is anticipated, identified successors are considered first. A formal transition plan may include overlap time with the outgoing leader, mentorship, and post-transition check-ins.

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