



Human Resource Committee Meeting

CareerSource Tampa Bay

May 25, 2022 3:30 PM - 4:30 PM EDT

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| A. Next Meeting: TBD | |

Pledge of Allegiance





Human Resource Committee Meeting Minutes

CareerSource Tampa Bay
Oct 27, 2021 at 11:00 AM EDT

Attendance

Members Present (Remote):

Michael Bach, Richard Bennett, Sophia West

Members Absent:

Andrea Cichon

Attendance

Members Present (Remote):

Sheila Doyle, John Flanagan, Barry Martin, Tammy Stahlgren, Michelle Zieziula

Board Liaison Present (Remote):

Ken Jones

I. Call to order, Welcome, and Roll Call (Presenters: Michael Bach)

Chair Michael Bach called the meeting to order at 11:00 a.m. There was a quorum present.

II. Pledge of the Allegiance (Presenters: Michael Bach)

Chair Michael Bach led the pledge of allegiance.

III. Public Comments (Presenters: Michael Bach)

There were none.

IV. Action Items

- A. Approval of Minutes - September 8, 2021 Special Human Resource Meeting (Presenters: Michael Bach)

Motion:

To approve the minutes of September 8, 2021, Special Human Resource Committee meeting.

Motion moved by Sophia West and motion seconded by Richard Bennett. Motion carried.

V. Discussion Items

- A. CSTB Handbook and CEO Evaluation Update (Presenters: Barry Martin)

We have contracted with GrayRobinson, PA to review our current handbook We will bring back proposed changes to the committee.

CEO/President evaluation update: We have contracted with Robert Newman and Associates.

They are working on the following:

- An evaluation methodology to evaluate John Flanagan.
- Direct report evaluation.
- Executive Committee evaluation.
- Self assessment.

Next Steps:

- Schedule meeting with Board Chair to review process and then schedule a Special Executive Committee meeting.

B. CEO Succession Planning (Presenters: Michael Bach)

Chair Michael Bach led the lengthy discussion on succession planning for the Executive Director (CEO/President) of CSTB position and Board members.

There are currently no concerns with John Flanagan, CEO/President of CareerSource Tampa Bay.

The objective of the CEO succession plan: BOD Confidence that CSTB has a starting point for succession plan, for both it's Executive Director and Board of Directors.

Next Steps:

Kens Jones and Michael Bach to schedule a meeting to review the process.

C. HR Update (Presenters: Barry Martin)

HR is currently working on the following:

- Filling current open positions.
- Transitioning 401k plan from ADP to John Hancock.
- Health Benefits - Moving from Employee Navigator to Paylocity.
- Internal succession planning process.

VI. Adjournment

The meeting was adjourned at 12:13 p.m.

Minutes submitted by Tammy Stahlgren, Administrative Service Coordinator.

DRAFT



Policies & Procedures:

**Succession Plan
Institution**

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BARRY MARTIN
VICE PRESIDENT OF HUMAN RESOURCES & PROFESSIONAL DEVELOPMENT
813-297-2033
MARTINB@CAREERSOURCETB.COM

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HIGH POTENTIAL EMPLOYEE LISTING FOR 2022/20237

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Approval History

| YEAR | VERSION | APPROVAL NEEDED | APPROVAL DATE |
|------|---------|-----------------|---------------|
| 2022 | 1 | • | |

Revision & Change History

| VERSION | DATE | AMENDED BY | CHANGE HISTORY |
|---------|------|------------|----------------|
| | | | • |

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CareerSource Tampa Bay Succession Planning and Management Program

Mission Statement

The purpose of the succession planning and management program at CareerSource Tampa Bay is to prepare a ready supply of internal talent for key positions if determined that a high potential employee can be developed to fulfill the responsibilities of these key positions. This organization is fully committed to equal employment opportunity for all employees, regardless of race, color, religion, sexual orientation, gender identity or expression, national origin, age, disability, genetic information, marital status, amnesty, or status as a covered veteran in accordance with applicable federal, state, and local laws.

Policy and Philosophy

It is the policy of CareerSource Tampa Bay to help employees develop to the full extent of their potential and, to the extent possible for the organization, to help them achieve realistic career goals that satisfy both individual and organizational requirements.

This organization is firmly committed to promotion from within, whenever qualified talent is available, for key positions. This organization is also firmly committed to helping employees develop their potential so that they are prepared and qualified to assume positions in line with individual career goals and organizational requirements.

Process

At least once each year, the organization will sponsor:

- *A replacement planning activity* that will assess how well the organization is positioned to meet replacement requirements by promotions or other personnel movements from within.
- *Individual performance appraisal* to assess how well individuals are meeting their current job requirements.
- *Individual potential assessment* on targeted individuals to assess how well individuals are presently equipped for future advancement. Unlike performance appraisal—which is typically focused on past or present performance—the focus of individual potential assessment will be on the future.
- *Employee development planning (EDP)* to provide the means for action plans to help individuals narrow the developmental gap between what they already know or can do and what they must know or do to qualify for advancement.

The succession planning and management program will rely heavily on the processes listed above to identify individuals suitable for advancement. The program will work closely in tandem with an in-house individual development planning program, which is designed to help individuals identify their career goals and take proactive steps to achieve them.

Succession Planning Review 2022/2023

The Executive Leadership Team (ELT) will complete a review of a Succession Planning Replacement Grid (attached Exhibit A) to document which positions have been targeted for formal succession planning and interim staff coverage for key positions in emergency situations. In targeting positions for formal succession planning an emphasis will be placed on positions that were deemed most critical in the operation of the organization as well as identifying high potential employees that could be developed as possible successors for those positions. For those successors identified a formalized succession development plan will be developed or a plan will be implemented as part of the annual performance appraisal process. Below are listed the results:

Positions Targeted for Succession Planning and Management

- 1. Position: President & CEO, John Flanagan** (Example for discussion purposes only)
Selected Succession Manager: Michele Zieziula, SVP, Chief Impact Officer (Could also list other Internal Candidates) or External Candidate

A strong leader is vital to the success of CareerSource Tampa Bay. Mr. Flanagan assumed the role of President and CEO in January 2019. Ms. Zieziula, SVP, Chief Impact Officer has assumed various positions overseeing Business & Community Development, MIS & Data Services, Public Relations & Marketing and Development since her employment in October 2020. Ms. Zieziula also has extensive experience working in the workforce development system. She has also gained the respect and experience in working with the Board of Directors. As part of a formal succession development plan, it is believed that Ms. Zieziula would be ready to assume responsibilities of the President & CEO position in 1-2 years. It is also important to acknowledge that while Ms. Zieziula maybe position ready at the time of Mr. Flanagan's departure when he decides to leave his current employment, the County Commissioners and Board of Directors should also consider engaging in an external candidate search for which Ms. Zieziula and any other internal candidates may apply.

Some Examples of Selected Successors from my prior Succession Plans in the Financial Industry. Institution and Personal Names have been changed for Confidentiality Purposes but give an overview of how this section is written.

- 2. Position: Executive Vice President, John Doe**
Selected Succession Manager: Managed Assets Management function – Susan Day, AVP Special Assets Manager; Credit Administration function – High Potential Internal Candidate or External Candidate

The Bank has been fortunate to have the depth of experience Mr. Doe brings to the bank in being able to oversee the bank's Credit Administration and Managed Assets initiatives but also having a strong background in risk management, commercial lending, and commercial work-outs and collections. In analyzing this position, it was determined that Susan Day, AVP Special Assets Manager has the requisite knowledge and skills to be the successor for the managed assets management functions that Mr. Doe currently oversees. Ms. Day joined the bank in September 2002 as Special Assets Manager and in January 2011 assumed oversight for Credit and Mortgage Operations in addition to the Special Assets functions. It is believed that Ms. Day could be developed and position ready to assume these responsibilities in 1-3 years. For the Credit Administration function that Mr. Doe currently oversees, it was determined that that the bank has some internal high potential employees that we are monitoring to ascertain is they can develop the requisite skill sets to assume this role in the future. If not, then an external recruitment strategy for a person to oversee this role would need to occur in the future.

3. Position: Commercial Lenders

Selected Succession Manager: Develop high potential internal employees or external candidate search.

We currently have two senior commercial lenders due to retire in the next 5+ years. As a strong Commercial Lending team is instrumental to the bank's success, we will target a plan for internal candidate development or external candidate replacement in the next few years. The bank recently employed Mr. Tom Success as SVP and Senior Commercial Lender to strategically position our Commercial Lending efforts in the future. Mr. Success brings over 25 years of Commercial Lending Management experience in Maine to the Bank. Mr. Success will be assessing our internal capacity and working with the existing lenders to ensure a smooth transition as we close on their retirement timelines.

Interim Coverage in Emergency Situations

Manager/Position

Interim Manager

Executive Branch

John Flanagan, President and CEO

Michele Zieziula, SVP – Chief Impact Officer

Byron Clayton, SVP – Chief of Community and
Talent Development

Sheila Doyle, SVP – Chief Financial Officer

Donald Shepherd, Senior Director of Programs

Business Services

Kay Jefferson, VP of Business & Community
Development
Manager/Position

Michelle Zieziula, SVP – Chief Impact
Officer/Business Development Mgrs.
Interim Manager

Community & Talent Development

Conchita Canty-Jones, Director of Student
Engagement

Byron Clayton, SVP – Chief of Community
Talent Development

Compliance/Special Projects

April Torregiante, Director of Policy and
Special Projects

Donald Shepherd, Senior Director of
Programs

High Potential Employee Listing for 2022/2023

The Executive Leadership Team will review a listing of all employees annually to document which employees are identified as high potential employees. The following Performance and Competencies (the list is not inclusive and not all competencies will apply to all individuals) may be used to identify those persons:

- **Performance** - Does the individual meet or exceed performance expectations.
- **Builds Trust and Respect** – Establishing and maintaining effective relationships with employees, coworkers, managers and customers. Trusting people to perform and being trusted in return. Sharing responsibility and accountability, delegating routine and important work. Recognizing that everyone makes mistakes, including oneself, and not misrepresenting his or her own actions.
- **Communicates Effectively** – Expressing thoughts, expectations, ideas and intent effectively and concisely orally, in writing and through gestures and other forms of non-verbal communication. Listening attentively and accurately, even when not agreeing with the opinions of the speaker.
- **Demonstrates Accountability** – Stepping forward to take the lead, even when disapproved of by peers or politically risky to do so. Taking initiative and responsibility in resolving challenging issues and emergency situations. Holding people accountable through clear goals and consistent follow-up.
- **Motivation** – The desire or willingness to progress in one’s position or within the organization.
- **Meets and Exceeds the Expectations of Customers** – Taking action with the needs in mind of customers inside and outside the company. Seeking information that will improve company services and products. Using the quality process to ensure continuous improvement.
- **Commitment to the Organization** – Portraying actions and/or behaviors that show dedication to the organization.
- **Demonstrates Business and Technology Acumen** – Understanding market pressures that drive the company’s business. Understanding and applying knowledge of factors relating to workforce development systems and programs, department acumen, finance, and other program specific knowledge in

order to build a comprehensive business plan for own group. Having knowledge of operating systems and processes (both IT and people management), and other factors that affect profitability.

- **Develops the Skills and Abilities of Others** – Building the skills and abilities of employees, providing stretching assignments and compelling employees to plan and develop. Accepting development of employees as a building block for organizational success.
- **Inspires Direct Reports** – Challenging employees to do their best. Recognizing that each person has a unique set of internal motivators and using those motivators to make all employees want to do their best. Demonstrating that the work of every employee is critical to success and inviting each employee to share in the ownership of the unit's performance.
- **Creates and Implements a Shared Vision & Strategy** – Creating, understanding and articulating a detailed picture, direction and future focus for the company, division, or other area of responsibility that is consistent with the higher-level vision of the organization and that clearly maps the way for others to some future period. Anticipating future industry trends, determining customer needs, and using this information to develop strategic business plans and goals. Demonstrating the ability to effectively translate strategic goals into appropriate and profitable product and service offerings.

For those individuals that are identified as High Potential Employees and are not selected for formal succession planning and development; each senior manager will be responsible for ensuring those employees identified will have challenging development goals on their annual Employee Development Plan.

Exhibit A – Succession Planning Replacement Chart

See attached

Exhibit B – High Potential Employee Listing for 2022/2023

See attached

Exhibit A: Succession Planning Replacement Chart

| Department | Current Manager | Position | Yrs to Retire. Retire = 67 Yrs. Of Age | Position Targeted for SP&M 2022/2023 | Interim Manager - Emergency Situation | Selected Succession Manager | Title | Position Ready Now | Position Ready 1 - 2 Yrs. | Position Ready 3 - 5 Yrs. |
|--------------------------------|----------------------|---|--|--------------------------------------|---------------------------------------|-----------------------------|-------|--------------------|---------------------------|---------------------------|
| Executive | John Flanagan | President & CEO | 15 - 20 | | | | | | | |
| | Tammy Stahlgren | Administrative Services Coordinator | 10 - 15 | | | | | | | |
| | | Admin Services Asst. - Vacant/Hold | | | | | | | | |
| | Michelle Zieziula | SVP - Chief Impact Officer | 10 - 15 | | | | | | | |
| | Byron Clayton | SVP - Chief of Community and Talent Development | <5 | | | | | | | |
| | Sheila Doyle | SVP - Chief Financial Officer | 10 - 15 | | | | | | | |
| | Donald Shepherd | Senior Director of Programs | <5 | | | | | | | |
| Business Services | Kay Jefferson | VP of Business & Community Development | 15 - 20 | | Michelle Zieziula | | | | | |
| | David Robinson | Business Development Manager | 5 - 10 | | Kay Jefferson/Bus. Dev. Mgr. | | | | | |
| | Mario Rodriquez | Business Development Manager | <5 | | Kay Jefferson/Bus. Dev. Mgr. | | | | | |
| | Shalanda Ross | Business Development Manager | 15 - 20 | | Kay Jefferson/Bus. Dev. Mgr. | | | | | |
| | Maria Suarez | Business Development Manager | 20+ | | Kay Jefferson/Bus. Dev. Mgr. | | | | | |
| | Jonathan Wolf | Business Development Manager | 20+ | | Kay Jefferson/Bus. Dev. Mgr. | | | | | |
| | Doug Earle | Sector Strategist/Military Family | 10 - 15 | | Kay Jefferson/Bus. Dev. Mgr. | | | | | |
| | Jessie Gonzalez | Outreach Specialist | 15 - 20 | | Kay Jefferson/Bus. Dev. Mgr. | | | | | |
| | Jemelle Wilds | Outreach Specialist | 10 - 15 | | Kay Jefferson/Bus. Dev. Mgr. | | | | | |
| | | | | | | | | | | |
| Community & Talent Development | Conchita Canty-Jones | Director of Student Engagement | 10 - 15 | | Byron Clayton | | | | | |
| Compliance/Special Projects | April Torregiante | Director of Policy and Special Projects | 20+ | | Donald Shepherd | | | | | |
| | Indhira Chambers | Special Projects Coordinator | 15 - 20 | | | | | | | |
| | Wesley Barr | Special Projects Coordinator | 20+ | | | | | | | |
| | Elizabeth Holtman | Program Monitor | 10 - 15 | | | | | | | |
| | Ivelisse Torres | Program Monitor | 15 - 20 | | | | | | | |
| | Jenifer Ward | Program Monitor | 10 - 15 | | | | | | | |
| Development | Michelle Schultz | Director of Development | 20+ | | Michelle Zieziula | | | | | |
| Finance/Facilities | Anna Munro | VP of Fiscal & Administrative Compliance | 10 - 15 | | Sheila Doyle | | | | | |
| | Luna Clark | Compliance Manager | 20+ | | Anna Munro & Melissa Carroll | | | | | |
| | Melissa Carroll | Fiscal Compliance Coordinator | 20+ | | Anna Munro & Luna Clark | | | | | |

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|----------------------------|----------------------|--|--|--------------------------------------|---------------------------------------|-----------------------------|-------|--------------------|---------------------------|---------------------------|
| | Kelly Goodpasture | Accounting Manager | 20+ | | Sheila Doyle | | | | | |
| | Jessica Jenkins | Staff Accountants | 20+ | | Kelly Goodpasture | | | | | |
| | Kayla Sizemore | Staff Accountants | 20+ | | Kelly Goodpasture | | | | | |
| | Gamal Zahran | Facilities Manager | 20+ | | Sheila Doyle | | | | | |
| | | Facilities Technician Position (1) | | | Gamal Zahran | | | | | |
| | | | | | | | | | | |
| Human Resources | Barry Martin | VP of Human Resources and Professional Development | 5 - 10 | | Sheila Doyle & Dolores Martinez | | | | | |
| | Dolores Martinez | Human Resources Manager | 15 - 20 | | Barry Martin | | | | | |
| | | | | | | | | | | |
| Information Technology | Rich Beynon | Director of IT | 10 - 15 | | Sheila Doyle and Outside Consultant | | | | | |
| | Brandon Pham | IT/MIS Coordinator | 15 - 20 | | Rich Beynon | | | | | |
| | | IT Technician - New - (1) | | | | | | | | |
| | | | | | | | | | | |
| Marketing/Public Relations | Doug Tobin | VP of Marketing & Public Relations | 10 - 15 | | Michelle Zieziula | | | | | |
| | Shedlyn Joseph | Marketing/Outreach Specialist | 20+ | | Doug Tobin | | | | | |
| | Carla Ortiz | Marketing/Outreach Specialist | 20+ | | Doug Tobin | | | | | |
| | | | | | | | | | | |
| MIS/Data Services | Chad Kunerth | VP of MIS and Data Services | 20+ | | Michelle Zieziula | | | | | |
| | Matthew Quevedo | MIS Coordinator | 20+ | | Chad Kunerth | | | | | |
| | | MIS Data Enrty Specialists Positions (4) | | | Matthew Quevedo & Specialists | | | | | |
| | | | | | | | | | | |
| Programs: | | | | | | | | | | |
| Special Grants/Projects | Saleema Bennett | Program Director | 20+ | | | | | | | |
| | Zachariah Pearson | Program Coordinator - VETS/Military Spouse | 20+ | | | | | | | |
| | | Career Coach Positions (2) | | | | | | | | |
| | Cynthia Diaz | Program Coordinator - NDWG/ACE/TQA/Tech Boost/Others | 20+ | | | | | | | |
| | Andres Baez | Lead Career Coach | 20+ | | | | | | | |
| | | Career Coach Positions (3) | | | | | | | | |
| | | Recruiter Position (1) | | | | | | | | |
| | Laura Llera-Pearsall | Disability Program Navigator | <5 | | | | | | | |
| | | | | | | | | | | |

Exhibit A: Succession Planning Replacement Chart

| Department | Current Manager | Position | Yrs to Retire. Retire = 67 Yrs. Of Age | Position Targeted for SP&M 2022/2023 | Interim Manager - Emergency Situation | Selected Succession Manager | Title | Position Ready Now | Position Ready 1 - 2 Yrs. | Position Ready 3 - 5 Yrs. |
|---------------------------|--|--|--|--------------------------------------|---------------------------------------|-----------------------------|-------|--------------------|---------------------------|---------------------------|
| WIOA Youth/TBSH | Jennifer Wilson | Program Director | 20+ | | | | | | | |
| | | TBSH Lead Career Coach Positions (2) 6 - 8 Month Emp. | | | | | | | | |
| | | TBSH Career Coach Positions (15) 6 - 8 Month Emp. | | | | | | | | |
| | Danielle Copeland | WIOA Youth Placement Coordinator & TBSH Youth Program Coordinator | 20+ | | | | | | | |
| | | WIOA Youth Recruiting Coach Positions (2) | | | | | | | | |
| | | TBSH Lead Career Coach Position (1) 6 - 8 Month Emp. | | | | | | | | |
| | | TBSH Program Specialist Positions (4) 6 - 8 Month Emp. TBSH Marketing Specialist/Intern Positions (2) 4 - 6 Month Emp. | | | | | | | | |
| | Leondra Foster | WIOA Youth Training Coordinator | 20+ | | | | | | | |
| | | Lead Career Coach (1) Vacant/Hold | | | | | | | | |
| | | Career Coach Positions (7); Vacant/Hold (2) | | | | | | | | |
| | | Program Specialist Positions (2) | | | | | | | | |
| Ornette James-Constantine | Youth Workshop Instructor | 20+ | | | | | | | | |
| WTP/SNAP | Salcema Bennett | Program Director | 20+ | | | | | | | |
| | Michele McConnell | Program Coordinator | <5 | | | | | | | |
| | Stephanie Serrano | Lead Career Coach - WTP | 20+ | | | | | | | |
| | | WTP Career Coach Positions (9) | | | | | | | | |
| | | WTP Career Coach/Workshop Instructor (1) Vacant/Hold | | | | | | | | |
| | | WTP Program Specialist Positions (2); 1 Vacant/Hold | | | | | | | | |
| Samantha Childs | Lead Career Coach - SNAP | 20+ | | | | | | | | |
| | SNAP Career Coach Positions (4); Vacant/Hold (1) | | | | | | | | | |
| | SNAP Program Specialists (1) | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
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Exhibit A: Succession Planning Replacement Chart

| Department | Current Manager | Position | Yrs to Retire. Retire = 67 Yrs. Of Age | Position Targeted for SP&M 2022/2023 | Interim Manager - Emergency Situation | Selected Succession Manager | Title | Position Ready Now | Position Ready 1 - 2 Yrs. | Position Ready 3 - 5 Yrs. |
|--|------------------|---------------------------------|--|--------------------------------------|---------------------------------------|-----------------------------|-------|--------------------|---------------------------|---------------------------|
| Outsourced Service Provider - Adult/Dislocated Worker Programs and Business Services - EDSI | | | | | | | | | | |
| Regional Coordinator | 1 Position | | | | | | | | | |
| Project Acct/Specialist/Cont. Improvement | 1 Position | | | | | | | | | |
| Program Director | 1 Position | | | | | | | | | |
| Adult/Dislocated Worker Services | 31 Positions | | | | | | | | | |
| Business Services | 7 Positions | | | | | | | | | |
| | | | | | | | | | | |
| Outsourced Service Provider - One-Stop Operator & Career Svcs - EDSI | | | | | | | | | | |
| One Stop Operator | 1 Position | | | | | | | | | |
| Program Director | 1 Position | | | | | | | | | |
| Career Services Staff | 26 Positions | | | | | | | | | |
| | | | | | | | | | | |
| DEO Staff (Functional Supervision) | Anacelis Collazo | Jobs & Benefits Supervisor | | | | | | | | |
| | | ESR/Cust. Service Positions (8) | | | | | | | | |
| | William Farnands | Jobs & Benefits Supervisor | | | | | | | | |
| | | DVOP/LVER Positions (10) | | | | | | | | |

CAREERSOURCE TAMPA BAY
SUCCESSION PLAN PARTICIPANT ANNUAL DEVELOPMENT PLAN
PLAN YEAR

The individual below has been selected as a potential candidate to further develop knowledge, skills and abilities (KSAs) to be able to assume the functions of a specific position or portions of a specific position in the future. This should not be construed as a guarantee of any position in the future. Rather, this plan which will be completed/updated annually, will document plan goals and progress in specific areas to measure position/function readiness to possibly assume these responsibilities in the future.

NAME: Click here to enter text.

POSITION: Click here to enter text.

DEPARTMENT: Click here to enter text.

Short-Term Succession Goal: Click here to enter text.

Long-Term Succession Goal: Click here to enter text.

ACTION PLAN

Development Area: Click here to enter text.

Plan: Click here to enter text.

Scheduled Date: Click here to enter text.

Completed Date: Click here to enter text.

Development Area: Click here to enter text.

Plan: Click here to enter text.

Scheduled Date: Click here to enter text.

Completed Date: Click here to enter text.

Development Area: Click here to enter text.

Plan: Click here to enter text.

Scheduled Date: Click here to enter text.

Completed Date: Click here to enter text.

Employee Signature:

Date:

Employee Signature:

Date:

A copy of this plan is kept by all who signed and in H Resources.

Non-Exempt Overall Assessment 2010 to 2013

| GRADE 20 | Mid 20 to Mid 21 = 8.2% | 2015 Overall | 2014 Overall | 2013 Overall | 2012 Overall |
|----------|------------------------------|--------------|--------------|--------------|--------------|
| | | Assessment | Assessment | Assessment | Assessment |
| NAME | POSITION | | | | |
| | Account Clerk I | M | M | M | M |
| | Teller I - FT2 | N/A | N/A | N/A | N/A |
| | Teller I - PT | N/A | N/A | N/A | N/A |
| | Teller I - FT2 | M | M | M | M |
| | Teller I Float - FT2 | N/A | N/A | N/A | N/A |
| | Teller I Float FC FT2 | M | N/A | N/A | N/A |
| | Teller I PT HS | N/A | N/A | N/A | N/A |
| | Teller I FT2 | N/A | N/A | N/A | N/A |
| | Teller I Float FT2 | M | N/A | N/A | N/A |
| | Teller I | M | M | M | M |
| | Teller I FT2 | M | M | N/A | N/A |
| | Teller I PT | N/A | N/A | N/A | N/A |
| | Teller I FT2 | N/A | N/A | N/A | N/A |
| | Teller I PT | M | N/A | N/A | N/A |
| | Teller I PT HS | N/A | N/A | N/A | N/A |
| | Teller I PT | N/A | N/A | N/A | N/A |
| | Teller I PT | N/A | N/A | N/A | N/A |
| | Teller I FT2 | M | N/A | N/A | N/A |
| | Teller I Float PT | N/A | N/A | N/A | N/A |
| | Teller I | M | N/A | N/A | N/A |
| | Teller I | M | M | N/A | N/A |
| (21) | | | | | |
| GRADE 21 | Mid 21 to Mid 22 = 11.8% | Overall | Overall | Overall | Overall |
| | | Assessment | Assessment | Assessment | Assessment |
| NAME | POSITION | | | | |
| | Loan Servicing Clerk PT | N/A | N/A | N/A | N/A |
| | Loan Servicing Clerk | M | M | M | M |
| | Loan Servicing Clerk | M | M | N/A | N/A |
| | Loan Servicing Clerk | N/A | N/A | N/A | N/A |
| | Teller II (PT) | M | M | M | M |
| | Teller II | M | N/A | N/A | N/A |
| | Teller II | M | M | M | M |
| | Teller II (PT) | M | M | M | N/A |
| | Teller II | M | M | N/A | N/A |
| (9) | | | | | |
| GRADE 22 | Mid 22 to Mid 23 = 11.5% | Overall | Overall | Overall | Overall |
| | | Assessment | Assessment | Assessment | Assessment |
| NAME | POSITION | | | | |
| | Accounting Clerk II | E | M | M | M |
| | Collections Representative I | M | M | N/A | N/A |
| | Facilities Operator II (PT) | E | E | N/A | N/A |
| | Facilities Operator II | E | E | E | E |
| | Information Proc. Analyst | M | E | M | M |
| | Indirect Loan Processor | M | M | M | M |
| | Internal Controls Clerk | M | M | M | M |
| | Internal Controls Clerk | M | M | M | M |
| | Item Processing Clerk II | M | N/A | N/A | N/A |
| | Item Processing Clerk II | M | M | M | M |
| | Loan Processor | E | M | N/A | N/A |
| | Loan Processor | M | M | M | M |

Non-Exempt Overall Assessment 2010 to 2013

| | | | | | |
|-----------------|--------------------------------------|-------------------|-------------------|-------------------|-------------------|
| | Loan Processor | M | M | E | E |
| | Teller III FT2 | M | N/A | N/A | N/A |
| | Teller III FT2 | M | N/A | N/A | N/A |
| | Teller III FT2 | M | N/A | N/A | N/A |
| | Teller III | M | M | M | M |
| | Teller III | M | M | M | M |
| | Teller III | M | M | M | M |
| | Teller III | M | M | M | M |
| | Teller III | M | M | M | M |
| | Teller III | M | M | M | M |
| | Teller III | M | M | M | M |
| | Teller III | M | M | M | E |
| | Teller III | M | M | M | M |
| | Teller III | M | M | M | M |
| | Teller III | E | E | M | M |
| | Teller III FT2 | M | N/A | N/A | N/A |
| (27) | | | | | |
| GRADE 23 | Mid 23 to Mid 24 = 9.9% | Overall | Overall | Overall | Overall |
| | | Assessment | Assessment | Assessment | Assessment |
| NAME | POSITION | | | | |
| | Assistant Controller | M | M | M | D |
| | Call Center Prerepresentative PT | M | N/A | N/A | N/A |
| | Call Center Representative | M | M | M | M |
| | Call Center Representative | M | M | M | M |
| | Call Center Prerepresentative PT | M | D | M | M |
| | Call Center Representative FT2 | N/A | N/A | N/A | N/A |
| | CSR I | E | E | E | M |
| | CSR I | M | M | M | M |
| | CSR I | M | M | M | M |
| | Deposit Ops Clerk II FT2 | N/A | N/A | N/A | N/A |
| | Deposit Ops Clerk II | M | M | M | N/A |
| | Deposit Ops Clerk II | M | M | M | M |
| | Deposit Ops Clerk II | M | M | M | M |
| | Deposit Ops Clerk II FT2 | E | E | M | M |
| | Deposit Ops Clerk II | E | E | E | E |
| | Float Branch Supervisor - Teller III | E | E | E | E |
| | Float Branch Supervisor - Teller III | M | M | E | M |
| | Junior Credit Analyst | M | M | M | N/A |
| | Loan Servicing Specialist | M | E | M | M |
| (19) | | | | | |
| GRADE 24 | Mid 24 to Mid 25 = 20.7% | Overall | Overall | Overall | Overall |
| | | Assessment | Assessment | Assessment | Assessment |
| NAME | POSITION | | | | |
| | Branch Operations Asst. | M | M | M | M |
| | Branch Operations Asst. | E | E | E | E |
| | Branch Supervisor | M | M | M | M |
| | Branch Supervisor FT2 | M | N/A | N/A | N/A |
| | Branch Supervisor | M | N/A | N/A | N/A |
| | Branch Supervisor | M | M | M | M |
| | Branch Supervisor | N/A | N/A | N/A | N/A |
| | Branch Supervisor | M | M | M | M |
| | Branch Supervisor | E | M | M | M |
| | Branch Supervisor | M | M | E | M |
| | Branch Supervisor | E | E | E | E |

Non-Exempt Overall Assessment 2010 to 2013

| | | | | | |
|-----------------|------------------------------------|-------------------|-------------------|-------------------|-------------------|
| | Branch Supervisor | M | M | M | M |
| | Branch Supervisor | M | M | M | M |
| | Branch Supervisor | M | M | M | M |
| | Branch Supervisor FT2 | M | N/A | N/A | N/A |
| | Branch Supervisor FT2 | M | N/A | N/A | N/A |
| | Branch Supervisor | M | E | E | E |
| | Collections Representative II | M | E | E | E |
| | CSR II | M | M | E | M |
| | CSR II | M | M | E | M |
| | Deposit Operations Supervisor | E | E | E | E |
| | Electronic Service Rep/Call Ctr | E | E | E | E |
| | Call Center Representative | E | E | M | N/A |
| | Executive Assistant PT | M | M | E | E |
| | Item Processing Clerk II | E | E | E | E |
| | Loan Processing Supervisor | N/A | N/A | N/A | N/A |
| (26) | | | | | |
| GRADE 25 | | Overall | Overall | Overall | Overall |
| | | Assessment | Assessment | Assessment | Assessment |
| NAME | POSITION | | | | |
| | Retail Sales Officer - Salaried NE | M | E | E | E |
| (1) | | | | | |