PATHWAYS TO TRANSITION SUCCESS





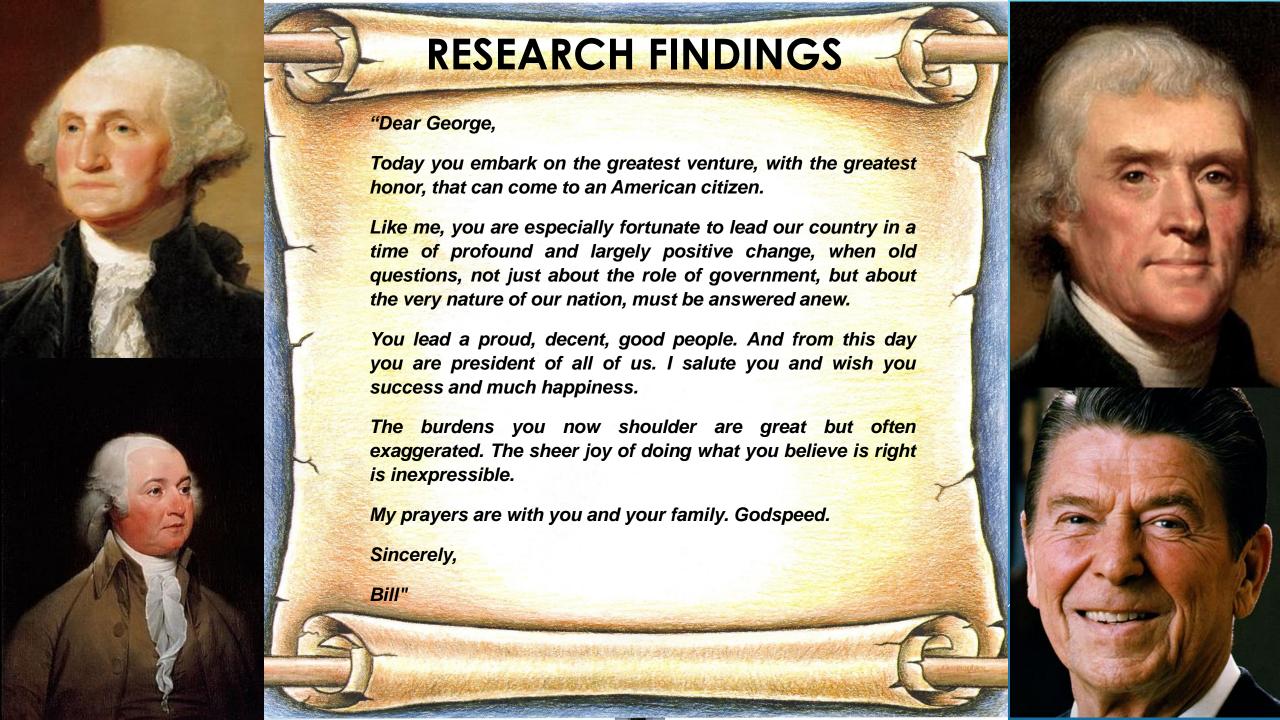
- **EBONY JOHNSON**
- MIKE WEILAND
- TIM GAUNT
- PATTINA COLLINS-PAISLEY
- MIKE MILLER

PROJECT BACKGROUND





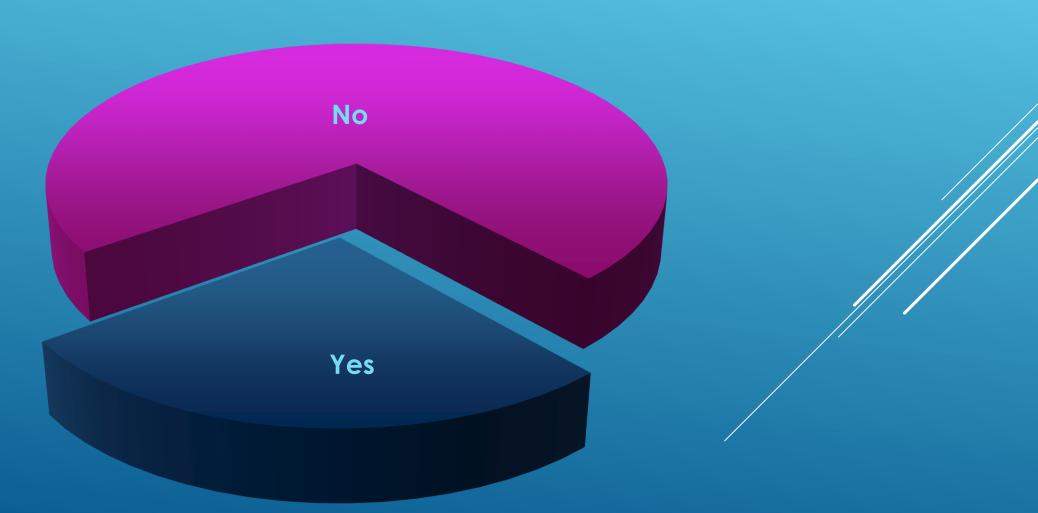




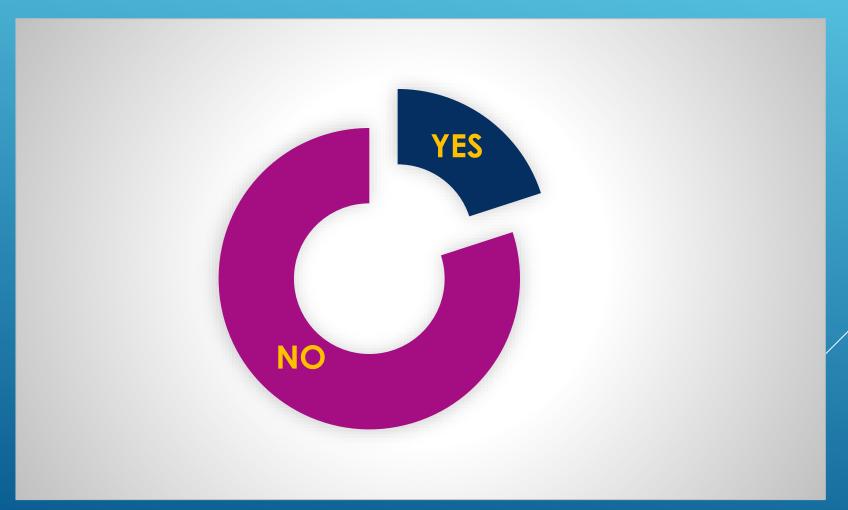
> SURVEY OF CFOs FROM STATE AGENCIES



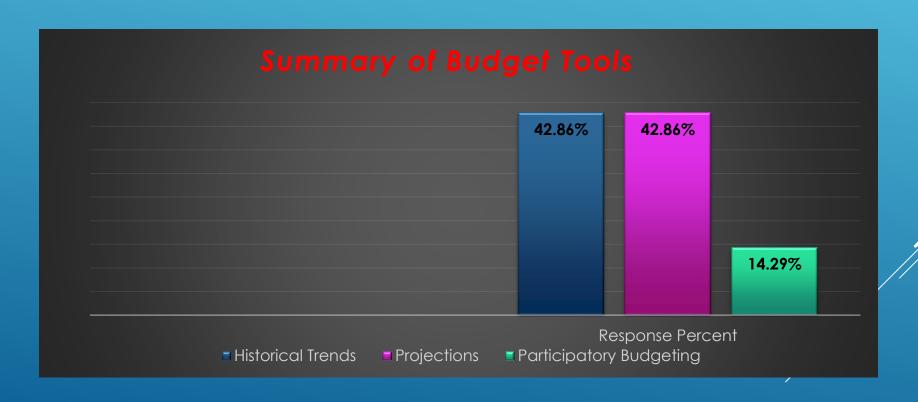
Does your agency have a documented process to ensure knowledge is transferred from an incumbent CFO to their successor?



Does your agency provide a period of time for the incumbent CFO to work directly with their successor?



In addition to OBM guidance, what other tools does your agency use for budget development?



What security/approver roles are assigned to your agency's CFO in OAKS?

TABLE 4	
Question 13 Responses	Frequency
Budget Approver	3
All	2
PO Reviewer	2
Read Access Only	2
AP Approver	1
Accounts Receivable	1
Chart Fields	1
FIN Security	1
Requisition Approval	1
Travel & Entertainment	1
Voucher Approval	1
Not Assigned or Do Not Know	7

RELATIONSHIP BETWEEN SUCCESSION PLANNING AND TRANSITION PLANNING

► GRADUATE SCHOOLS OF BUSINESS
► BUSINESS PUBLICATIONS

GRADUATE SCHOOLS OF BUSINESS HARVARD BUSINESS SCHOOL

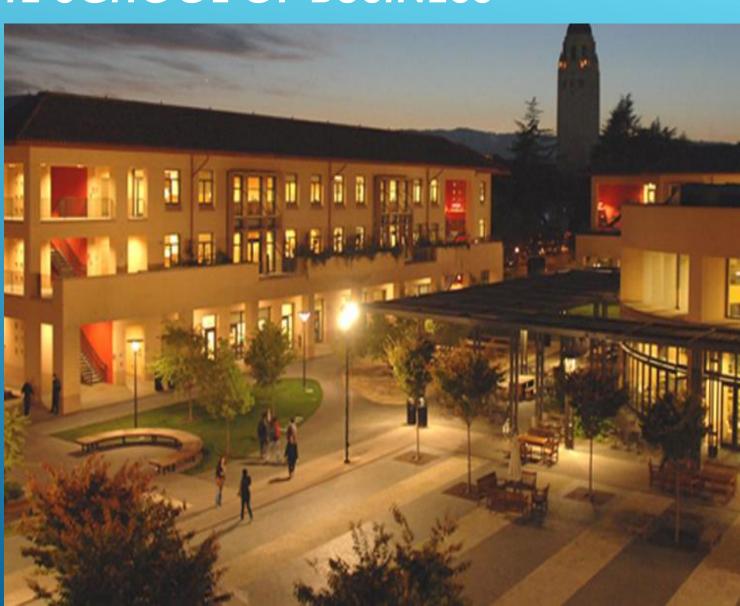
- 1. CHANGE
- 2. METRICS
- 3. KEEP IT SIMPLE
- 4. STAY REALISTIC



> GRADUATE SCHOOLS OF BUSINESS

STANFORD GRADUATE SCHOOL OF BUSINESS

- 1. STRATEGIC PLANNING
- 2. TALENT ASSESSMENT
- 3. RECRUITING
- 4. PERFORMANCE ASSESSMENT
- 5. DEVELOPMENT
- 6. RETENTION AND ENGAGEMENT



- > GRADUATE SCHOOLS OF BUSINESS
- > WHARTON SCHOOL OF BUSINESS

DEVELOP TALENT FROM WITHIN



> BUSINESS PUBLICATIONS

> THE WALL STREET JOURNAL

- CFO AN argyle COMPANY
- HEIDRICK & STRUGGLES

ACCOUNTEMPS A ROBERT HALF COMPANY

> PRIVATE SECTOR SURVEY





ALTOIDS



































Juicy Fruit





By O.Red



























MasterFoods:

goodness knows















DOLMIO





Onboarding Tools

Human Resources Supervisor Peer Partner

for State Employees

Agency Toolkit

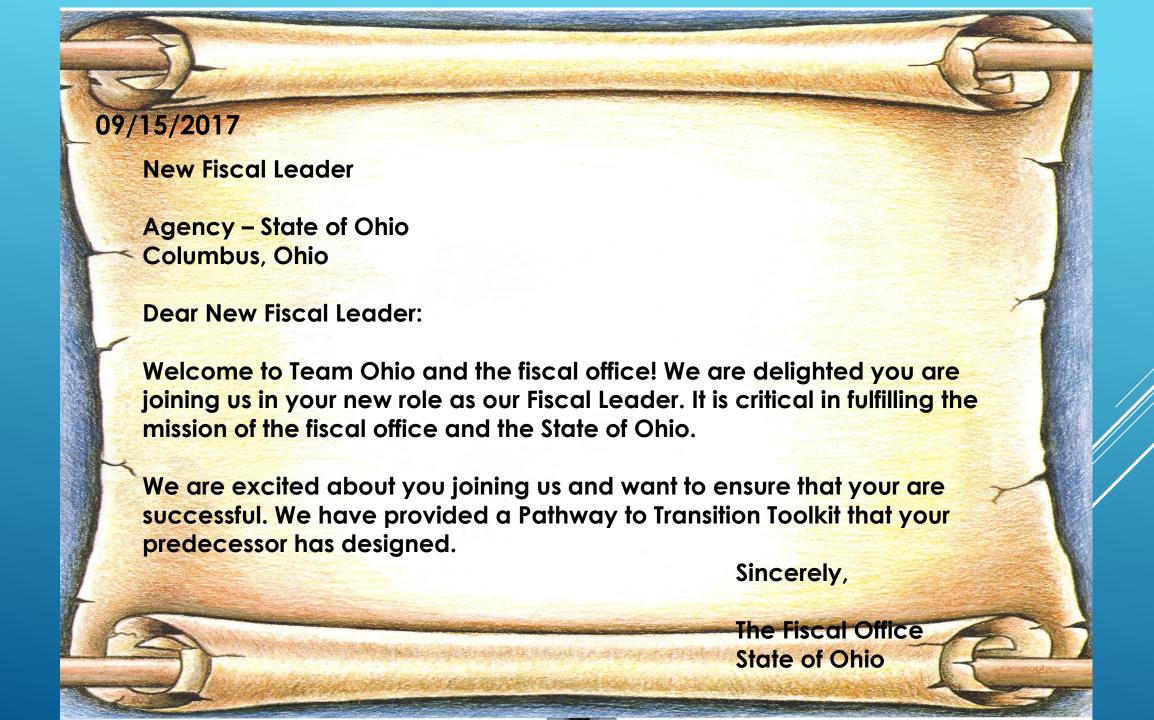
DO YOU HAVE THE TOOLS TO BE PREPARED?

DON'T BE SCARED



DO YOU HAVE THE TOOLS FOR TRANSITION SUCCESS? BE PREPARED

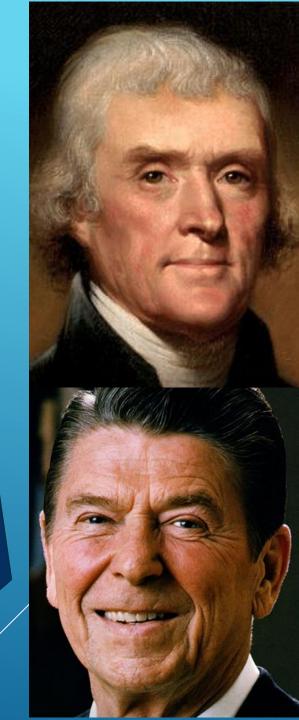






PRESIDENTIAL TRANSITION LETTER

KNOWLEDGE TRANSFER LETTER



DO IT BEST

PATHWAYS TO TRANSITION SUCCESS

BEPREPARED

TOOLKIT























RECAP

BRAIN DRAIN

QUICK TURNAROUND

RESEARCH RESULTS

TRANSITION LETTER & SCALABLE TOOLKIT

SUCCESSFUL TRANSITION

THANK YOU!

JENNIFER NICHOLS JASON VERMILION MATTHEW DYER

THE END!

QUESTIONS?