Contributors

Allison Schreiber, MAIR
School Safety Specialist
National Center for School Safety

Brent Allen Miller, MA, PMP
Training Manager
National Center for School Safety

Kiera Dressler, MSW Candidate
Research Assistant
National Center for School Safety

The National Center for School Safety (NCSS) is a Bureau of Justice Assistance-funded training and technical assistance center at the University of Michigan School of Public Health. As a multidisciplinary, multi-institutional center focused on improving school safety and preventing school violence, the NCSS team is composed of national leaders in criminal justice, education, social work, and public health with expertise in school safety research and practice. NCSS provides comprehensive and accessible support to Students, Teachers, and Officers Preventing (STOP) School Violence grantees and the school safety community nationwide to address today’s school safety challenges. NCSS serves as the national training and technical assistance provider for the STOP School Violence Program.

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Overview
All organizations have to manage changes in personnel. To help prepare for those changes, it is important to ensure that your team has the right documentation, plans, and resources.

Who is This Quick Guide For?
This document is for STOP School Violence grantee teams, grant managers, school administrators, and school safety project teams.

What is the Purpose of This Quick Guide?
This document provides readers with an overview of considerations to address changes in project personnel due to turnover, changes in job scope, etc.

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Addressing Changes in Personnel

The following sections aim to help you address changes in personnel. Planning is necessary to ensure continuity and a smooth transition when the composition of your team changes. Changes can occur at the school safety team level, the grant project level, or even at the leadership level.

Retention of personnel and effective transitions are important to the sustainability of school safety projects. For example, beyond the needs of the project it is important to maintain stability among school staff so that trained personnel are always available to support safety. Their continued presence also has an impact on school climate. When staff feel supported and know who is responsible for what, both morale and the project benefit.

No matter where the changes in personnel are occurring, it is important to document practices, procedures, and protocols before employees leave. This means protecting the sanctity of projects and identifying and training those people who are helpful and can pick up the pieces when employees leave. There should also be regular audits to identify needs or process improvements.

Key considerations for getting new staff up to speed and ensuring that departing staff has successfully transitioned include:

» **Staff training on your organization’s file management system** (Google Drive, shared hard drive, etc). It is essential that all staff know where key documents are located, how they are updated, and what their responsibilities are when it comes to managing the organization’s files.

  » Key documents may include project plans, workflow documentation, job descriptions, and meeting notes for other teams.

  » For STOP grantees, this also includes ensuring your project team and leaders have access to JustGrants, financial management training (if needed for that role), and an awareness of any withholding conditions still on the award.

» **Consistent communication with those who oversee or influence your project’s success.** There is a broad range of influences that have an effect on your project. These influences could include school leaders, parents, grant funders, and/or technical assistance staff. Ensuring you know these influences and that they know you (or another key contact on your team) is helpful, especially when questions arise.
Below are descriptions of various strategies to help you address changes in staff, and checklists to help you and your team consider how to implement those strategies.

Offboarding

When a key member of your project team or your organization submits their notice to resign, it is useful to have an offboarding process. Below is a sample checklist you can use before someone leaves your organization to assess their current project responsibilities and outstanding tasks. Please note: This is not an exhaustive list of considerations (for example, it does not address removing user access to physical spaces).

Knowledge Transfer
- Location of a grant proposal, the scope of work, and other records
- Determining who they collaborate with for projects they own
- List of important contacts (e.g., for STOP grantees, the name, email address, and phone number of their BJA Grant Manager and NCSS School Safety Specialist)
- List of resources they frequently referred to and/or found useful in their work (file sharing platform like Google Drive, task management system like Asana or Trello, reference material such as a Comprehensive School Safety Guide)
- Write down undocumented processes or guides that they use
- Recording all of the tasks they do on a weekly basis
- List of outstanding tasks
- Status report of the current project(s)

Account Access
- Access to and permissions in JustGrants and Grants.gov
- Access to school safety technologies or reporting systems (threat assessment, anonymous reporting)
- Any other account access needed to do the job

Notification of Departure
- Notify BJA Grant Manager of new contact
- Notify NCSS School Safety Specialist of new contact
- Notify relevant individuals at the organization and/or community
Cross-Training

When one person carries specific knowledge or expertise, their departure may be especially difficult for project teams and organizations. To promote flexibility and ensure continuity of your team’s effort, it is important to cross-train multiple people on core responsibilities:

- Identify the roles and responsibilities of everyone on the project team
- Cross-reference skills (pair positions that require similar skills or strengths)
- Identify the method of cross-training (on-the-job, online, instructor-led)
- Explain the benefits to your team (enables agility, strengthens team relationships, may improve employee satisfaction, improves processes)
- Conduct the training
- Implement a rotation plan to keep skills and knowledge up-to-date
- Collect feedback to improve your cross-training plan

Onboarding

Knowledge Transfer

- Provide a list of important contacts (e.g., for STOP grantees, the name, email address, and phone number of their BJA Grant Manager and NCSS School Safety Specialist)
- Provide a list of resources they may frequently refer to and/or will find useful in their work (file sharing platform like Google Drive, task management system like Asana or Trello, reference material such as a Comprehensive School Safety Guide)
- Share location of a grant proposal, scope of work, and other records
- Status report of the current project(s)
- List of next most important tasks
- Review any project management work plans, communication plans, and evaluation plans that your organization is using
- Get trained in whatever program your grant project is using, if applicable
Account Access
- Access to and permissions in JustGrants and Grants.gov (as needed based on their role)
- Access to school safety technologies or reporting systems (as needed based on their role)

Notification of Arrival
- Notify BJA Grant Manager of the new contact (when appropriate)
- Notify NCSS School Safety Specialist of new contact (when appropriate)

Succession Planning

Changes in personnel happen at the leadership level as well. A succession plan helps identify and develop new, potential leaders who can move into leadership roles while maintaining stability in your organization. A good succession plan allows time to prepare proactively instead of constantly being forced to use traditional reactive hiring practices.

Succession planning is necessary to ensure continuity and a smooth transition in leadership while recognizing the needs of students, parents, and community partners as the school district moves forward. To implement sustainability in school leadership, succession plans need to be created in advance and must acknowledge the culture of the school district.[3][4]

A good framework for succession planning should be a systems-oriented approach that includes three major components: (a) identification of top talent, (b) targeted development, and (c) retention of the highest performing employees.[5]
Designing a Succession Plan

You can develop a succession plan for your organization based on the following model adapted from the Office of Personnel Management's Workforce Planning Model.\(^5\)

**Step 1: Direction**
Establish the goals and objectives of the plan. What does your school district hope to accomplish? How will it align with your goals and mission? How does employee development fit in? What measurable objectives do you have for a succession plan? What evaluation criteria will you use (this ties into Step 5: Monitor later on)?

**Step 2: Analyze**
By using an assessment tool, you can determine specific numbers and projected needs in terms of your district workforce. Use job descriptions, surveys, interviews, and subject matter experts in this process.

The following assessment tool, modified from one developed by the Social Security Administration, can help you identify the positions in your school district with the highest potential for a vacancy. The tool is a starting point that can be modified to reflect your organization’s structure and context.
## Succession Planning Assessment Tool

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<th>Position Description &amp; Responsibilities</th>
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### Vacancy Risk
*The amount of time pending until the position becomes vacant.*

- [ ] The position is vacant
- [ ] **High**: 1 day – 6 months
- [ ] **Medium-High**: 6 months – 1 year
- [ ] **Medium**: 1 – 3 years
- [ ] **Low**: Greater than 3 years
- [ ] **None**: No perceived vacancy

### Impact
*The effect that a vacancy will have on the organization.*

- [ ] **High**: Immediate impact on the organization’s ability to uphold the responsibilities of the position
- [ ] **Medium**: Slight impact felt immediately; The position must be filled as soon as possible
- [ ] **Low**: Potential to create an inconvenience, but the organization maintains responsibilities

### Knowledge, Skills, and Abilities for the Position

*This is what is required to fill positions. This information is critical in identifying and developing potential replacements for an imminent vacancy as well as ways to assess current employees.*

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### Preparing for Changes in Personnel

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Step 3: Develop
Identify the methods for meeting the recruiting, training, and restructuring needs of your school district. You want to ensure that your employees are adaptable, prepared, effective, and efficient. This includes creating a timeline of change to nail down the needs of current and future workforces. By or during this step, you should determine the method for rolling out, implementing, monitoring, and changing your succession plan.

You should also consider how you might respond in a staff emergency. What is your response when several employees submit their resignations simultaneously? How does this response fit into your plan?

Other considerations include staff compassion resilience, or other needs related to the wellbeing of staff. [2]

Step 4: Implement
Take action! Apply the ideas identified during the development stage. Ensure you’re following up with relevant parties as the implementation progresses. Change does not happen successfully overnight.

Step 5: Monitor
Evaluate your progress and be prepared to modify the plan if it does not align with your goals. To guarantee effective data monitoring, design a way to evaluate the effectiveness of the plan. What works? What doesn’t? What needs to be modified?
Preparing for Changes in Personnel

References


