



Republic of the Philippines  
**SOCIAL SECURITY SYSTEM**

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**OFFICE ORDER NO. 2022-084**

**SUBJECT : SSS SUCCESSION MANAGEMENT PROGRAM GUIDELINES**

This Office Order prescribes the guidelines in the implementation of the SSS Succession Management Program (SMP) to ensure leadership continuity through identification, selection, development and retention/advancement of potential employees involving the provision of developmental opportunities and experiences to make them ready, capable and willing to assume the key leadership position, anytime such vacancy exists.

**I. OBJECTIVES**

The SSS SMP aims to:

1. Provide proactive approach to the identification of key critical positions (KCPs) and potential successors (PS) capable of advancement to positions with higher responsibility;
2. Create strategic and systematic development plan for PS to meet the required qualifications and competencies of the next higher position;
3. Build a pool of high potential successors (HiPoS) for key positions in various offices and units by providing development opportunities and experiences;
4. Promote employee engagement and retention by meeting career development expectations as well as establishing positive career goals; and
5. Develop and maintain strong leadership to ensure that the SSS can keep pace with demands and changes in the business and its overall environment.

**II. DEFINITION OF TERMS**

**A. ASPIRATION**

Willingness and drive to move to senior roles and leadership positions.

**B. BENCH STRENGTH**

Refers to an organization's ability to fill critical positions internally.

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**C. HIGH POTENTIAL SUCCESSORS**

PS identified based on their ability, motivation, organizational commitment, and aspiration to rise and succeed in more senior positions in the organization.

**D. HIGH POTENTIAL TURNOVER**

Indicator of the efforts to retain high-potential employees. Low turn-over of high potential employees indicates that organization's succession planning is effective.

**E. INDIVIDUAL CAREER DEVELOPMENT PLAN (ICDP)**

A development and action planning tool of potential successors through a systematic identification and assessment of an individual's current and future developmental needs, and implementation of developmental interventions to best prepare them in meeting the qualifications and competencies required of the targeted position.

**F. KEY CRITICAL POSITIONS**

Executive/managerial positions that are vacant or anticipated to be vacant by the incumbent who is 56 years old and above, or with high level of policy-setting and decision-making responsibilities affecting the organization's direction and success.

**G. NEXT-IN-RANK**

A position which by reason of hierarchical arrangement of positions in the SSS is determined to be the nearest degree of relationship to a higher position.

**H. POTENTIAL SUCCESSORS**

Next-in-rank employees identified as potential candidates to the KCPs.

**I. SUCCESSION MANAGEMENT**

A proactive approach in managing talent as it involves identification of potential successors for anticipated needs and tailored development of employees so that there is a talent pool or leadership pipeline available to meet organizational demands as they arise.

**J. SUCCESSION MANAGEMENT PROGRAM SOURCE DATABASE**

Excel file database maintained for succession purposes.

**K. 9-BOX GRID**

A tool for measuring the performance and potential of people in the organization.

### **III. SCOPE OF THE PROGRAM**

The SSS SMP shall cover all officers and employees who are PS to the identified KCPs. These employees shall comprise the pool of PS for middle and senior management positions.

### **IV. LEGAL BASIS**

The SSS SMP is established in accordance with Civil Service Commission (CSC) Memorandum Circular (MC) No. 3 s. 2012 on the Program to Institutionalize Meritocracy and Excellence in Human Resource Management (PRIME-HRM).

One of the components of PRIME-HRM is the Comprehensive HRM Assistance, Review and Monitoring (CHARM) which is generally a detailed appraisal of human resource management systems and standards. The areas covered by CHARM are the HR Management Systems and Programs which include the establishment and implementation of Succession Planning under HR Systems (CSC MC. No. 3, s. 2012 Page 2-4).

### **V. ROLES AND RESPONSIBILITIES**

The concerned individuals/groups/units shall have the following roles and responsibilities:

#### **1. POTENTIAL SUCCESSORS / HIGH POTENTIAL SUCCESSORS**

- a. Commits to the succession management processes;
- b. Provides information and data to support in the evaluation of qualifications;
- c. Drives personal development by investing time, effort and resources;
- d. Keeps a receptive mind to feedback and advices;
- e. Displays willingness and interest to learn and adapt; and
- f. Commits to the implementation and updating of his/her Development Plan.

#### **2. PERFORMANCE MANAGEMENT AND EMPLOYEE RELATIONS DEPARTMENT (PMERD)**

- a. Establishes succession management procedures and guidelines;
- b. Identifies KCPs, List of PS and HiPoS in coordination with concerned Heads of Units/ Departments / Divisions / Groups / Sectors;
- c. Maintains and updates the SMP Source Database;
- d. Collaborates with PS, Supervisors and Managers in creating the ICDP;
- e. Coordinates, monitors and evaluates the implementation of SMP;
- f. Provides non-training development interventions based on ICDP;

- g. Engages PS in the non-training development intervention;
- h. Monitors career development progress; and
- i. Provides guidance and support when needed.

**3. LEARNING AND DEVELOPMENT DEPARTMENT (LDD)**

- a. Provides necessary training programs based on the ICDP of HiPoS and competency assessment result/s;
- b. Ensures that the training needs of the HiPoS are met;
- c. Engages HiPoS in the training development interventions;
- d. Provides information and data on the trainings attended and provided to the HiPoS both internal and external; and
- e. Provides support when needed.

**4. ORGANIZATIONAL PLANNING AND STAFFING DEPARTMENT (OPSD)**

- a. Provides necessary materials and references including the following, but not limited to: (1) Organizational Structure, (2) Plantilla of Positions, (3) Qualification Standards (QS), (4) Appointments and Designations, (5) Competency Tables and Matrices, and (6) Merit Selection Plan needed for the evaluation of KCPs and PS;
- b. Assists in the evaluation of the PS' qualifications to the KCP;
- c. Recommends announcement of vacancies for the appointment of HiPoS;
- d. Recommends career advancement opportunities (designations) for HiPoS; and
- e. Provides support when needed.

**5. EMPLOYEE SERVICES DEPARTMENT**

- a. Ensures employee data are updated and readily accessible;
- b. Provides necessary materials and references including the following, but not limited to: (1) Separation Data Report, (2) 201 File, and (3) other files needed for the updating of SMP Source Database to keep track on personnel movements and data updates; and
- c. Provides support when needed.

**6. HEAD OF BRANCH/DEPARTMENT/DIVISION/GROUP/SECTOR**

- a. Identifies PS and HiPoS for the KCPs;
- b. Assists PS in creating and attaining the ICDP;
- c. Engages in mentoring program;
- d. Provides feedback and motivational coaching; and
- e. Ensures active engagement to the SMP.

## VI. SUCCESSION PROCESS

### 1. IDENTIFICATION OF KCPs

KCPs in the System shall be identified based on the following conditions which shall be confirmed by the Head of the Human Resource Management Group:

- a. Needs and directions of the organization;
  - Positions that are required/prioritized by the Management
- b. Required unique skill set or knowledge base;
  - Positions that require skill/s or knowledge and are difficult to replace or demand specific experience
- c. Bench strength; and
- d. Vacant or anticipated vacant positions
  - Positions which have an impact of losing the incumbent on the organization's deliverables

### 2. IDENTIFICATION OF PS AND HiPoS

#### a. Potential Successors

List of PS for the KCPs shall be identified based on the following:

- Next-in-rank employees based on organizational structure;
- Education and previous experiences;
- Career Interests based on the ICDP;
- List of PS provided by the incumbent Heads; and
- Recommended by the President and CEO.

All identified PS shall be required to accomplish the **CAREER PLAN FORM** to determine their interests and goals in the next three (3) years.

#### b. High Potential Successors

HiPoS among the list of PS shall be identified through the **9-BOX GRID** to be accomplished by the concerned Heads.

Those PS who expressed their interest/aspiration for promotion and identified as HiPoS shall be the subject of the next SMP processes.

### 3. ACCOMPLISHMENT OF THE ICDP AND EVALUATION OF READINESS

The identified PS/HiPoS shall undergo readiness assessment based on the following conditions:

1. Meets the required competencies for the identified KCP. The result of the Leadership Competency Assessment Test (LCAT) shall be used to review the competencies of the HiPoS.
2. Meets the minimum CSC-prescribed/approved QS for the identified KCPs.
3. With at least Very Satisfactory (VS) Performance Ratings for the past two (2) rating periods in the current position or one (1) rating period on the revised SSS Strategic Performance Management System.

The readiness assessment shall be determined through the **LCAT** and the accomplishment of the **ICDP**. LCAT results and inputs from the ICDP shall also be used to identify the needed development interventions and activities to address the qualification and competency gaps and/or further strengthen the current competencies of the PS/HiPoS.

In the conduct of LCAT, identified HiPoS with aspiration for promotion shall be prioritized.

#### **4. IMPLEMENTATION OF DEVELOPMENT PLAN**

HiPoS shall undergo the Leadership Development Program (LDP) to develop competencies and meet the required qualifications of the KCP. The LDP shall include the following:

- a. *Formal trainings for the Development of Leadership/Managerial Skills and Competencies* such as Visioning, Achieving Goals, Managing Work, Problem Solving and Decision Making, Motivating and Developing People. Also, admission to management training courses such as, but not limited to:
  1. Branch Officership Program (BOP) – a 6-month program designed to fast track career path of supervisors from the branches and support units who are capable of advancement to branch officership positions. A comprehensive course on social security and branch operations, complimented by an on-the-job training or internship;
  2. Middle Management Development Program – a course designed to update our middle managers with latest trends and practices in management. This is also designed to enhance their critical thinking and strategic decision-making skills; and
  3. Basic Management Program – designed to equip target participants, mostly identified supervisors and professionals (i.e lawyers, doctors, auditors, etc.) with the

necessary knowledge and skills to prepare them to handle supervisory/managerial positions.

Trainings may also be individualized by targeting the specific learning needs of the HiPoS. These formal trainings shall be provided by LDD.

- b. *Non-training Interventions for the Development of Leadership/Managerial Competencies* through combination of Job Shadowing, Mentoring, Coaching, Job Enrichment, Job Enlargement, Job Rotation which would expose, allow actual hands-on experience, enriched tasks, special job assignments under the mentorship of the incumbent and/ or other Executive Mentors.
- c. *Designation to Managerial Positions* to provide exposure to actual managerial experience. Identified BOP graduates are designated as Acting Branch Heads or Acting Assistant Branch Heads, until such time that vacancies are announced wherein said graduates can apply.

HiPoS shall be provided with engagement programs and activities to further motivate and retain them, increase their productivity, and enhance their sense of well-being.

All interventions / activities made to prepare the HiPoS to the next-higher position shall be recorded in the SMP Source Database, 201 File and/or Human Resource Management System for information / data retrieval anytime needed by the System.

## **5. MONITORING AND EVALUATION OF THE SMP**

Progress and completion of developmental activities of PS/HiPoS in meeting the required qualifications and competencies of the KCP shall be regularly monitored.

Periodic assessment of the SMP on its effectiveness based on the following criteria shall be conducted and improvements/enhancements on the guidelines and processes shall be recommended, as necessary:

- a. Number of PS/HiPoS identified for each KCP;
- b. Bench Strength;
- c. Percentage of KCPs filled internally; and
- d. PS/High-Potential Turnover

The Manual of Procedures Order Forms shall be submitted to the Approving Authority within 30 days from the issuance of this Office Order.

This shall supersede Office Order No. 2015-065 (SSS Succession Management Program) dated 12 November 2015.

Please be guided accordingly.

  
**MICHAEL G. REGINO**  
President and CEO

09 NOV 2022

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Date

*(Personnel Matter – Others)*  
*(Prepared by: Performance Management and Employee Relations Department)*

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