

Succession Planning

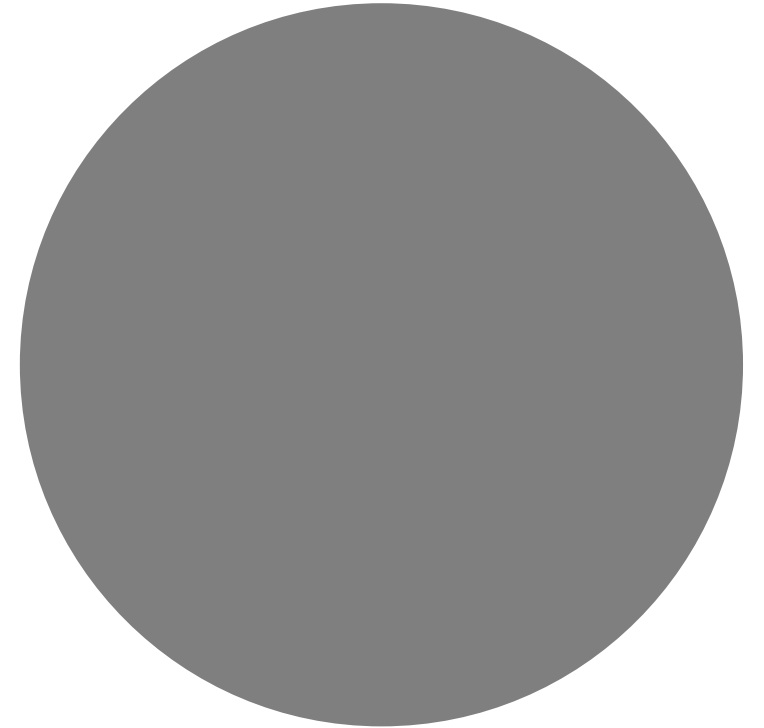
presented to

Texas Association of State Senior College and University Business Officers
(TASSCUBO)
October 21, 2019

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Succession Planning

The workforce we create, engage and sustain ultimately determines your institution's future.



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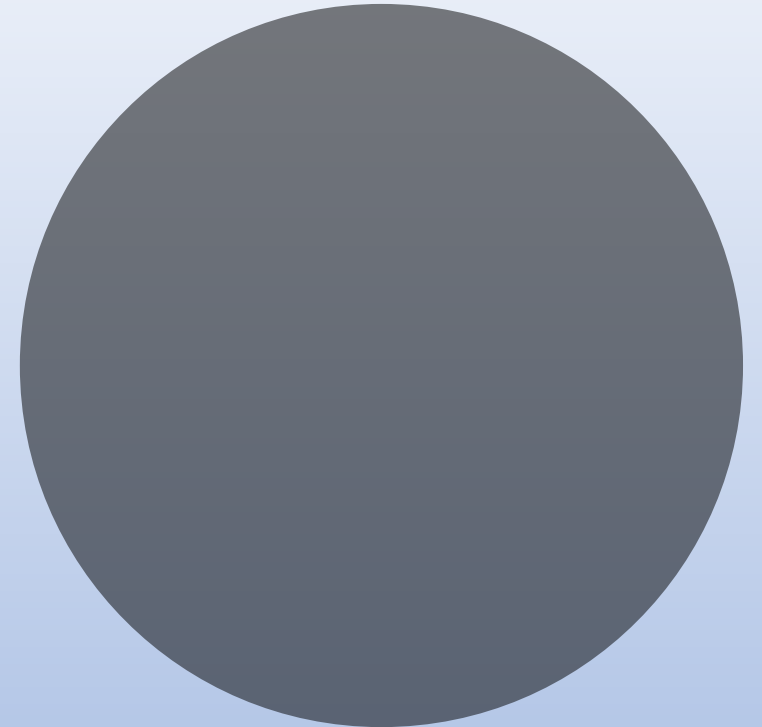
Who will lead your organization into the future?

Definition of Succession Planning

Planning the potential *replacements* of current leader positions. This may include identifying those who are fully qualified for the incumbent's position, those who are expected to be ready within a specified number of years, and/or those who are expected to be ready once specific competencies are developed.

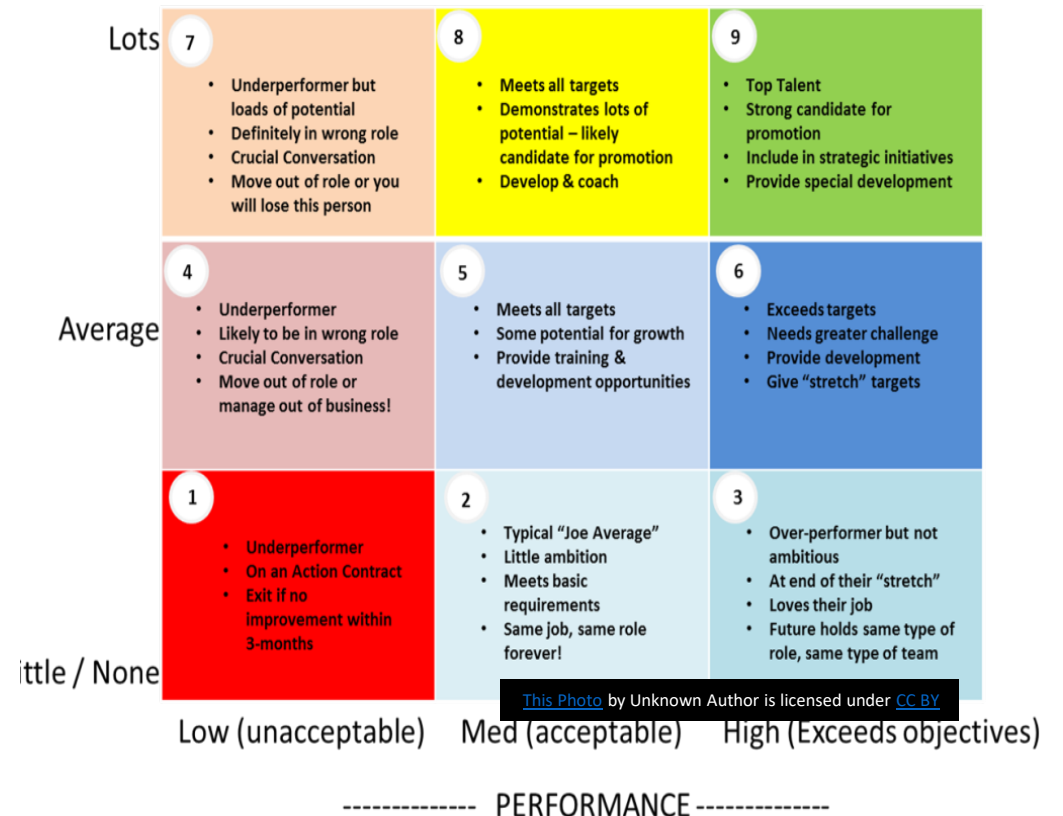
Objective of Succession Planning

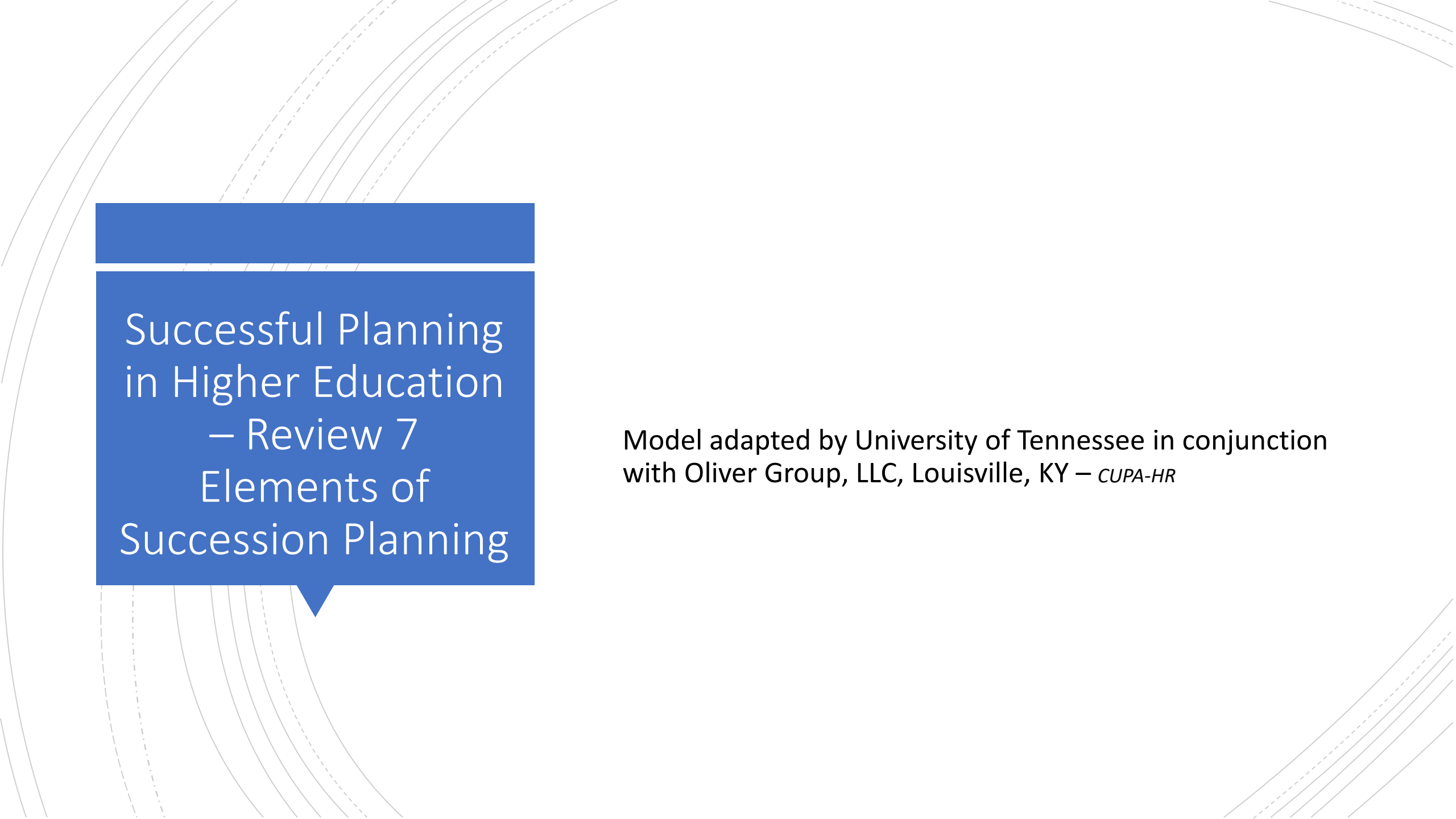
- Assessing your workforce with a Succession lens
- Build your leadership pipeline by identifying High Potentials (HP)
- Retain and train High Potential employees who share the following key characteristics:
 - Aspiration
 - Ability
 - Engagement



Components of Successful Succession Plan

- Executive – Level Sponsor
- Nine – box chart (Potential vs Performance) process
 - The 9 Box is a Leadership Talent Management Tool used to assess individuals on two dimensions:
 - Their past performance and
 - Their future potential
- Resources
- Timeline
- Review Process



The background features several sets of concentric, curved lines in shades of gray, some solid and some dashed, creating a sense of motion and depth. A blue rectangular box with a white border and a small white triangle at the bottom center contains the main title text.

Successful Planning in Higher Education – Review 7 Elements of Succession Planning

Model adapted by University of Tennessee in conjunction
with Oliver Group, LLC, Louisville, KY – *CUPA-HR*

Step 1 – Commitment Confirmation/Organizational

Organizational Readiness

Is the organizational committed to this effort?

Step 2 – Key Position Identification

Criteria:

- Hard to Hire Positions
- Hard to Fill Positions
- Critical jobs with the greatest complexity
- Positions where the incumbent is most likely to leave in the next 1-3 years

Conduct a workforce analysis

Step 3 – Position Competency Development

Define the core competencies

- The knowledge, skills and ability attributed to effective leaders

Proficiency levels – minimum requirements and desired

The incumbent has to self report

Step 4 – Self nominate, Manager’s nominate



Establish criteria that will be used and minimize potential bias claims



Determine best approach for your organization



Nominations –

- Self,
- Peer
- Manager

Step 5 – Assess Competencies of Potential Successors

Assessed on:

- Technical capabilities
- Their proficiencies around the competencies identified for the role

Assessed by:

- Supervisors,
- Executives, the individual may have interacted with
- Peers
- Through self-assessment techniques.

Step 6 – Create High Potential (Successor) Individual Development Plan (IDP)



Keep it simple – 1 to 3 development actions per High Potential



Use a variety of resources to develop:

Mentoring
Coaching
Training

Training
Work Assignments
Job Shadowing



Provide training and development activities
where the High Potential has opportunity to
demonstrate the use of skill(s)

NACUBO – Ex. Fellows Program, Future or New Business
Officers, Mentoring Program

Step 7 – Periodic Review of Actions



Establish a plan for reviewing completions/development of readiness

Alignment between individual development plan (IDP) and the HP's annual performance review



Establish timeline for reviewing Succession Planning process outcomes.



Plan for milestone celebrations

Questions?

Have a Successful Planning Week!