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## Benchmarking Succession Planning & Executive Development in Higher Education:

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### Introduction

Higher education has historically been slow to adopt many corporate management processes. Succession planning is an especially difficult concept to apply in academia due to dramatic cultural differences between the boardroom and the campus. College and universities often have complex and sometimes bureaucratic procedures for hiring compared with many business corporations (Rosse & Levin, 2003). In a tightening economic and growing competitive climate, innovative colleges and universities are re-examining whether succession planning, coupled with executive development, could be adapted for more cost effective transitions of power and authority.

As reported by others, there is little new research on succession planning in recent years (Goodpractice.net news, 2002) and an ongoing dearth of writing about succession planning as applied in higher education. In order to understand the corporate policies and processes that are available for possible adaptation in higher education, a literature review of corporate succession planning is warranted. As relevant, applications to higher education will be discussed.

### Literature Review

The following 10 core principles are used to describe corporations that are serious about implementing and maintaining best practices in executive succession planning:

- They have strong, involved boards.
- They continually expose their top management team to the board.
- They encourage “next generation CEO’s” to gain exposure to outside board service, to the media and to the investment community.
- They form executive committees or operating committees to facilitate the development of several executives who are aware of the challenges, business plans, and strategies across the entire organization.
- They view succession planning as an ongoing and “real time” process.
- They take as much of the human drama out of the succession process as possible.
- They link the CEO’s compensation to the development of succession plans.

- They pay their directors increasingly in stock and require the directors to make a personal investment in the company.
- They periodically calibrate likely internal candidates for CEO against comparable outside leaders.
- They develop a “succession culture”

(Carey, Ogden, & Roland, 2000)

In the higher education arena, many parallels could be drawn to create such a best practices checklist for colleges and universities that should be serious about succession planning:

- They have strong, involved trustees.
- They continually expose their vice-presidents/vice-chancellors to the trustees.
- They encourage “next generation presidents/chancellors” to gain exposure to outside community, to the media and to the alumni membership.
- They form executive committees or operating committees to facilitate the development of several administrators who are aware of the challenges, business plans, and strategies across the entire institution.
- They view succession planning as an ongoing and “real time” process.
- They take as much of the human drama out of the succession process as possible.
- They link the president/chancellor’s compensation to the development of succession plans.
- They require the trustees to make a personal commitment to the institution.
- They periodically calibrate likely internal candidates for president/chancellor against comparable outside leaders.
- They develop a “succession culture”

In an academic setting, similar incentives and emphasis could be placed on the preparation of other senior administrative executives such as provosts and deans. The principles and processes embodied in the forgoing checklist are discussed in the following literature review.

In the corporate world it is important that the succession plan receives visible support from the CEO and top management (Eastman, 1995). Visible support and commitment of the CEO and top management are cited as cardinal elements of succession planning and some experts have suggested that without support and involvement from the top of the organization, even “the best succession plans are doomed for failure (Clark & Lyness, 1991; Executive KnowledgeWorks, 1987; Friedman, 1986; Hall, 1984; Hall & Foulkes, 1990; Lee, 1981). The same would be true for higher education as not only the senior executives but all prospective members of the inimitable search committees would need to be visibly supportive of the process (Rosse & Levin, 2003).

Based on their experience with succession plans in a variety of organizations, Mahler and Drotter (Mahler & Drotter, 1986) concluded that a major requirement of succession planning is top-management action; Top management must make a commitment to and actively participate in the

succession planning process. Similarly, NAPA (National Academy of Public Administration, 1992) conducted a comprehensive study of succession-planning practices in both the private and public sector and concluded that top-leadership involvement and commitment is a common characteristic of successful succession plans.

In the corporate setting, as will no doubt be the case in higher education, the succession plan needs to be simple and tailored to unique organizational needs (Eastman, 1995). The succession plan should be kept as simple as possible and easy to operate (Mahler & Drotter, 1986; McManis & Leibman, 1988; Moore, 1986; Spoor, 1993). The succession planning system should have a mission statement which describes the purpose of the system, who it will serve, and the desired outcomes (Eastman, 1995). In addition, the succession plan must be tailored to the organization's culture, characteristics, and operating environment (Beatty, Schneier, & McAvoy, 1987; Fenwick-McGrath, 1988; Gratton & Syrett, 1990; Hansen & Wexler, 1988; Mahler & Drotter, 1986; McManis & Leibman, 1988; National Academy of Public Administration, 1992).

Succession planning requirements will not be the same across organizations, and organizational characteristics, such as structure, size, wealth, growth rate, maturity, and management values are all factors that must be taken into account when designing a plan (Carnazza, 1982; Executive Knowledgeworks, 1988; National Academy of Public Administration, 1992; Rhodes & Walker, 1984; Rothwell, 1994). For example, size and wealth will be related to resources available for succession planning, and smaller, less complex companies will tend to have less formal succession plans (Rhodes & Walker, 1984) and the succession planning needs will be different for a company that is in a rapid growth mode versus one that is characterized by slow growth or decline (Eastman, 1995).

Buckner and Slavenski (1994) suggest that the corporate succession plan can only be designed after "profiling the organization" and evaluating a number of issues. Many of these same questions are valid in higher education. For example: Are business units centrally managed or decentralized? What are the positions needing successors? For example, Kmart's succession-planning program began by identifying specific business needs that the plan would need to address; at the same time, the succession-planning coordinator made benchmarking visits to organizations with reputations for effective succession-planning practices (Rothwell, 1994). It is similarly submitted that benchmarking schools both as peers and those towards which an institution aspires would benefit succession planning in higher education. Each institution should be asking itself "what are we doing to keep the good people we have?" (Marchese, 1989); and what are other institutions of similar size and mission doing?

Any succession plan must be flexible and linked with a strategic plan (Eastman, 1995). The succession plan should be an evolving and iterative process that reflects any significant changes in the strategic plan (Mahler & Gaines, 1983). It is suggested that corporate succession planning should be "an ongoing process like the business planning itself" (Leibman & Bruer, 1994). Rapid organizational and environmental changes call for a flexible succession plan which is intricately linked to the strategic business plan and designed to respond to evolving organizational needs (Borwick, 1991; Buckner & Slavenski, 1994; Clark & Lyness, 1991; Hall & Seibert, 1991; Kesner, 1989; National Academy of Public Administration, 1992; Rhodes, 1988; Rothwell, 1994; Walker, 1980). Colleges and universities also find themselves more and more being thrust into a rapidly shifting environment and marketplace and will therefore need to be similarly agile.

Moreover, both the demands of key positions and the skills and abilities required of people in these positions will fluctuate with changes going on in the industry and the succession plan must reflect such changes (Allison, 1993; McManis & Leibman, 1988; Rothwell, 1994). Organizations should first review their business plans before discussing individuals and positions; then they should ask more specific questions such as, "What types of people will we need in the future to achieve our strategies and goals?" (Kramer, 1990). Higher education succession plans would benefit from such introspection as well (Jugenheimer, 1993; Kauffman, 1993; Stein & Caruso, 1993).

In the corporate setting, the best succession plans evolve from a thorough human resources review process (Eastman, 1995). In a small sample of universities recently polled for a benchmark study, periodic human resources review meetings typically provide the forum for identifying superior employees and planning for their development (Clunies, Shriane & Taylor, 2003). Beyond factors of cost, morale, and risk in an external appointment, another reason peculiar to higher education for the nurture of internal talent is that academic change takes time and continuity of leadership to effect (Marchese, 1989).

Mahler and Drotter (1986) contend that the review meeting is the most important aspect of a succession planning system. Buckner and Slavenski (1994) claim that the review meeting is essential because it creates the energy for completing the succession planning process, it gives top management the opportunity to provide support, and job moves and developmental actions are more likely to occur when managers openly discuss candidates. Rothwell (1994) also claims that periodic review meetings are crucial for the success of a corporate succession planning program, because it helps keep the program on target and emphasizes the importance of succession planning to key executives. There is nothing culturally that would seem to prohibit such reviews in colleges and universities. To the contrary, a number of institutions of higher education already provide for them (Clunies, et al., 2003).

Large corporations, like large educational institutions, often have many separate and discrete operational units within the larger organization. To improve the quality of the review process in organizations with separate functions or business units, Getty (Getty, 1993) suggests broadening views: succession plans should be presented in a group format in which top managers present their succession plan for their individual units; this approach prevents organizations from developing a narrow view of where talent can be found and helps managers learn about talent outside of their area. In higher education, such convocations of administrators could allow for potential inter-divisional job movement for increased efficiency (Rosse & Levin, 2003).

In the corporate world, the effective succession plan is based upon well developed competencies and objective assessment of candidates (Eastman, 1995). The literature reviewed here and elsewhere suggests that succession planning involves clearly defining the requirements and requisite competencies for key positions and then identifying which employees could be developed to fill these positions in the future. To ensure that this is a fair and effective process, decisions should be based on systematic analyses of: (1) job requirements (both current and projected) of upper-level positions: and (2) the current performance levels and potential of individual employees (Rothwell, 1994). Effective succession planning systems are based on well defined competencies and reliable information about the current performance and potential of employees (National Academy of Public Administration, 1992). To be beneficial for higher education settings, any cultural obstacles to assembling such reliable

information would need to be overcome.

Burnett and Waters (Burnett & Waters, 1984) recommend using the action profile to identify requirements of upper-level positions. The action profile is “a description, in behavioral terms, of the managerial capacities, skills, and personal qualities required in a particular position”. The advantage of this profile is that it describes upper-level management positions in objective job-related terms, while also providing a common metric for assessing potential and readiness of succession candidates for particular positions. Competency assessments for key positions can also be obtained using a variety of methods, for example, merging a list of “generic management leadership competencies” along with “organization-specific competencies” to create an ‘executive success profile” (Rothwell, 1994).

Because most organizations are continuously changing, the focus of succession planning should not only be on competencies for current jobs. Successful plans must also focus on determining how jobs and organizational roles might change in the future and then define competencies needed to meet these changes (Rothwell, 1994; Wallum, 1993). As marketplace pressures mount, colleges and universities will increasingly need to also plan more prospectively (Rosse & Levin, 2003). Spoor (1993) recommends developing competency profiles based on an estimate of what positions in the organizations will look like in one, three, and five years. Rothwell (1994) also discusses methods for projecting requirements of future key positions, such as conducting future-oriented job analysis and determining the associated competencies required for success. Historically, this has not been an area of strength for academia, especially when it comes to identifying and developing leaders among faculty (Rosse & Levin, 2003).

To limit the role of subjective assessments and anecdotal assessments, succession candidates should be identified through formal assessment methods such as performance appraisal and other sources of job-relevant information, such as psychological tests and assessment centers (Beatty et al., 1987; Buckner & Slavenski, 1994). Objective and job-relevant assessment data help effectively identify succession candidates, while also providing essential information regarding the developmental needs of these candidates (Executive Knowledgeworks, 1988; Hinrichs & Hollenbeck, 1990; Rhodes & Walker, 1984). Performance appraisal data, which help identify which exemplary employees are an important source of information for succession planning (Mahler & Gaines, 1983; Rothwell, 1994). A survey of representatives from sixty-four U.S. corporations revealed that a majority of companies (95%) with successful plans reported thorough evaluation of candidates, a process that usually was tied to the performance-appraisal system (Executive Knowledgeworks, 1988). In the college and university setting, the ubiquitous search committee could clearly benefit from application of objective criteria in their evaluations of prospective candidates (Marchese, 1989).

The organization’s culture, life-cycle stage, technology, degree of risk associated with decision making, and the type of feedback cycle should all be considered. The assessment of executive/organization match should involve comparing each potential executive’s skills and competencies profile with the organization’s requirements in terms of tasks, roles, culture, risk, feedback, and technology. These are factors that many search committees focus on instinctively but it would no doubt be beneficial to emphasize this function of search committees (Marchese, 1989).

Borwick (1991, 1992) recommends that, given the growing importance of teams in organizations, succession planning should involve collecting data on teams as well as individual positions and individual candidates. Similarly, Leibman and Bruer (1994) claim that instead of identifying the right

person for the right position at the right time, corporations are looking to continually develop strong leadership teams for strategic tasks". This might be a way to cushion the shock of succession implementation in higher education. Rather than selecting an individual (say a Provost) to succeed a retiring President, a pool of qualified successors (other vice-presidents, etc.) could be identified and developmental experiences could be devised to facilitate leadership growth in all of them.

Several experts advocate PC (personal computer) automation for effectively managing the vast amounts of data generated by corporate succession planning (Butterill, 1990; McElwain, 1991; McManis & Leibman, 1988; National Academy of Public Administration, 1992; Spoor, 1993). Especially in larger organizations, PC automation helps simplify data collection and integrate the succession-planning system with other personnel systems (Buckner & Slavenski, 1994; Rothwell, 1994). Higher education institutions certainly do not lack the technological savvy or bandwidth to take advantage of such software, provided it was tailored to the unique needs of the academy.

The corporate literature reviewed suggests that, in addition to information on the requirements of upper-level management positions and objective assessment data on potential successors, the succession plan should incorporate information on the career needs and aspirations of individual staff members (Eastman, 1995). Succession planning should be a collaborative process designed to meet the career needs of the individual as well as the organization (Mahler, 1981). Buckner and Slavenski (1994) contend that the best succession-planning system is one that meets the needs of both the organization and its staff.

However, the literature points out that the clandestine nature of succession planning in many organizations often precludes employee involvement, and succession plans emphasize organizational needs without regard to the needs and interests of individual employees (Eastman, 1995). When formulating succession plans, corporate decision-makers are reported to rarely consider a candidate's willingness or desire to assume a new position, relocate, or to engage in developmental activities (Borwick, 1993; Buckner & Slavenski, 1994; Carnazza, 1982; Getty, 1993; Hall, 1986). The danger of this approach is that staff may refuse promotions or new positions that conflict with their career goals and needs (Rothwell, 1994). Similarly in higher education, the cultural environment of the given program, department, or school may also interfere with allowing meaningful participation in the succession plans. Research in this area would be helpful in determining the extent to which colleges and universities are their own worst succession planning enemy.

Once the requirements of upper level positions and succession candidates have been identified, decision makers must plan how they will provide developmental opportunities that will prepare candidates for future organizational demands (Beatty et al., 1987; Executive Knowledgeworks, 1988; Hansen & Wexler, 1988; Moore, 1986). For each succession candidate there should be an individual development plan (IDP), which outlines planned activities that will help "narrow the gap between what individuals can already do and what they should do to meet future work requirements of one or more positions" (Rothwell, 1994). Such IDPs should be tailored to the unique needs of each candidate and should focus on three major categories: work experiences and assignments, coaching, and educational courses and seminars (Kramer, 1990; Mahler & Gaines, 1983; Walker, 1980).

It is reported that in the corporate setting, a pitfall of many succession planning systems is that they emphasize the identification and assessment of talent, while paying less attention to development

(Cowherd, 1986; Hall, 1986; Hall & Foulkes, 1990; Hall & Seibert, 1991; Mahler & Drotter, 1986). The National Academy of Public Administration's (1992) extensive review of the succession planning literature and practices led to the conclusion that, rather than select high-potentials first and then develop them, organizations will be more successful if they develop first, then select. This is the group development concept advanced earlier for higher education. By educating all suitable deans, a prospective provost may surface.

It is important to note the consensus that individual staff members and the organization must both assume responsibility for development. The organization should provide ample developmental opportunities along with the necessary support for development, such as developmental feedback and access to coaches or mentors (McCall, 1992; McCauley, Eastman, & Ohlott, 1995; Rothwell, 1994); but the organization must also convey the message that the ultimate responsibility for development lies with the individual first and the organization second (Hansen & Wexler, 1988; Hernandez, Haddock, Berhrendt, & Klein, 1991; Hinrichs & Hollenbeck, 1990). Encouraging staff to take personal responsibility for development is critical given the prediction that managers of the future increasingly will need to be self-learners in order to adapt to rapid organizational changes (Baldwin & Padgett, 1993; Hall & Foulkes, 1990; Hall & Seibert, 1991).

The frequent opportunity for developing candidates to accept new job challenges is a characteristic of effective succession-planning systems (McElwain, 1991; Rothwell, 1994). Although executive development practices traditionally have relied on formal educational programs, there is a growing awareness that managers learn primarily from challenging job experiences such as task forces, job rotations, line switches, and turnaround or fix-it assignments (Baldwin & Padgett, 1993; Buckner & Slavenski, 1994; Derr, Jones, & Toomey, 1988; Fenwick-McGrath, 1988; Hinrichs & Hollenbeck, 1990; Mahler & Gaines, 1983; McCauley et al., 1995). Job rotations in which high-potentials are given assignments that expose them to critical aspects of the business, are a common form of executive development that help prepare individuals for more senior positions in the organization (Beatty et al., 1987; Derr et al., 1988; Rothwell, 1994).

The concept of such job rotations seems to be foreign to most institutions of higher education at present, especially at senior management levels. However, perhaps its efficacy should be explored. How much more effective might a collegiate vice-president for finance be after having spent some time walking in the shoes of the vice-president for student services? How more extensive could the insight be that is brought to the job by a vice-president for development who has spent time in the trenches inhabited by the academic vice-president? How much more valuable to the institution might all of these individuals be, on an interim or permanent basis, should a vacancy develop in the position of president?

Succession planning requires intentional movement of individuals among assignments for developmental purposes, even when not in the best interest of short-term business necessity (Hinrichs & Hollenbeck, 1990; Walker, 1980). Placing candidates in assignments for which they are not fully qualified—stretch assignments—creates a rich developmental opportunity; the novelty and challenges of a new job situation stretch the person beyond his or her current abilities (Friedman, 1986; Hinrichs & Hollenbeck, 1990; McCall, 1992; McCauley et al., 1995; McElwain, 1991; Rhodes & Walker, 1984). Citicorp, for instance, tries to place high-potentials into jobs for which they are no more than sixty-to-seventy percent qualified (Clark & Lyness, 1991).



Developmental assignments should be long enough to allow sufficient time for learning to occur (in corporations a duration of approximately two to three years is suggested), because too-rapid movement results in insufficient time to benefit from the developmental opportunities in a given assignment (Buckner & Slavenski, 1994; Derr et al., 1988; Executive KnowledgeWorks, 1987; Mahler, Drotter, & Mahler Associates., 1986). In industry it is important to have line managers involved in planning these moves and to get their support for moving people between organizational areas (Buckner & Slavenski, 1994; Kramer, 1990). Similarly, without the understanding and support of the staff, job rotation or cycling would have a greatly diminished opportunity for success.

Succession plans, be they corporate or higher education, should not function as an isolated system but rather as an integral component of the overall human resources planning process (Beatty et al., 1987). Such integration will provide a necessary safety net for both the individuals involved and affected members of their work community. Organizations should review other human-resources procedures and policies to determine how the plan will work in relation to these programs (Kramer, 1990). Rothwell (2001) contends that succession planning will be most effective when human resources practices are reviewed and designed to facilitate rather than impede succession planning efforts. Sahl (1987) and Mahler and Drotter (1986) also assert that the closer the link between the succession plan and other personnel systems, the more effective planning efforts will be.

As implied by the key practices stated above, the most effective succession plans are closely integrated with and build upon available information from existing human-resources systems, such as performance appraisal, management development, training and development, compensation, EEO and affirmative action, career planning, and recruitment (Borwick, 1992; Buckner & Slavenski, 1994; Executive KnowledgeWorks, 1987; Hernandez et al., 1991; Moore, 1986). Combining succession and career planning systems is also crucial (Butterill, 1990; Hall, 1986), and leading organizations are beginning to fuse these traditionally separate entities (Wallum, 1993). As Leibman and Bruer (Leibman & Bruer, 1994) conclude that “radical changes can be accomplished if succession planning is viewed not simply as a series of isolated events, but is inculcated with the ongoing management of the business and development of executive resources”.

Several corporate case studies summarized by Eastman (1995) evidence such integration. These include one where Burdett (1993) explains how a job-competencies approach (identifying in behavioral terms the essential characteristics for job success) has helped link performance appraisal, career planning, and succession planning at Lawson Mardon Group. Similarly, Mirabile, Caldwell, and O'Reilly (1986) advocate a job competency approach as the ideal way to integrate selection and assessment, career planning, management development, and succession planning, because these four systems have a common factor. Each deals with skills and abilities or competencies needed for successful job performance. Brush and Nardoni (1992) describe AT&T's integrated leadership system, which is designed to link succession planning, career development, and executive education.

The potential impact of succession planning is often limited because of insufficient follow-up on planned actions – developmental plans in particular (Hall, 1986; Mahler et al., 1986; Walker, 1980). Thus, in addition to establishing planned activities, the succession plan should contain a time frame that gives planned actions a deadline and a sense of urgency; and it should clearly delineate who is accountable for the implementation of specific developmental plans (Borwick, 1993; Hernandez et al., 1991; Rothwell, 2001). Vetter (1984) suggests that each review session should result in specific

outcomes that must be completed within the next twelve months by an accountable manager.

While such structured timetables would need to be adjusted to allow for the vagaries of the academic culture(s) and calendar of a particular institution, a more in depth study could be conducted to ascertain the feasibility of such a development structure in higher education. To ensure accountability and follow-up on developmental plans in the corporate, Rothwell (2001) suggests quarterly IDP meetings, wherein managers from each major area of the organization report on IDP progress in their areas. Or a succession planning coordinator can periodically meet with individual managers to review progress on the IDPs in their area of responsibility. Integration with existing processes would dictate certain actions.

Accountability can be increased by making specific outcomes of the succession plan visible, such as an annual report that summarizes the progress and outcomes of the succession plan (Mahler, Gaines, Mahler Associates., & Gaines and Associates Inc., 1983). Some organizations present progress measures at their review meetings. such as the number of successors who actually filled jobs for which they were slated or the number of positions staffed through the use of the succession database (Buckner & Slavenski, 1994). Progress measures such as number of positions filled internally, time taken to fill these positions, and the effectiveness of individuals who fill these positions also demonstrate the “bottom-line value” of succession planning and help convey the importance of succession planning to top management (Rothwell, 2001).

Finally, and perhaps foremost, it would be valuable for executives to recognize that development of their subordinates is one of their key responsibilities. Although organizations tend to reward managers more for short-term performance than or long-term development efforts (Mahler, 1981; Vetter, 1984), managers should be evaluated and rewarded for their efforts to develop their employees (Friedman, 1986; Hall, 1989). In the long run, the institutions themselves and the constituents served are the beneficiaries of such progress.

## Summary

In higher education, succession plans vary across organizations and should be tailored to an organization's unique needs. There are common elements that characterize effective corporate succession planning systems that appear analogous to those that would be needed to implement best practices succession planning in higher education. Shared ownership of the succession plan throughout all layers of the organization is paramount. Trustees and top administrators need to provide visible support and convey the message that succession planning is important. Deans and other executive administrators must assume active responsibility for the identification and development of talent and staff needs to provide functional support. Succession planning should be a flexible and evolving process that is intricately linked to the mission and strategic plan of both the department and the institution as well as respond to changing organizational demands. Succession planning decisions should be based upon well-defined requirements and competencies for the upper level administrative positions, both current and projected. They should also require objective assessment data regarding employees' current performance and readiness or potential for future upper level positions.

To operate most effectively, the succession plan should be closely linked with other personnel systems, such as performance appraisal, career development, and management development. The link between executive development and succession planning is especially crucial to the cultural “buy-in” to the process, and providing succession candidates with challenging job assignments is a potent develop

mental strategy. While this process can be more cumbersome given the typical job search mechanisms in place in most institutions of higher education, maybe it is all the more vital. Moreover, the planning process is more likely to satisfactorily meet the needs of both the organization and individuals participating in the process, if information on the individual's career wishes and aspirations are factored into the succession plan. Finally, the succession plan should include provisions for follow-up on planned actions and should hold the executive and senior administrators accountable for the development of their staff.

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