Effective Practices for Succession Planning in Higher Education

In this report, The Hanover Research Council provides an overview of best practices in succession planning. This report explores the use of succession plans in higher education, highlighting the key challenges faced by institutions as they seek to develop future leaders. The report further provides a comprehensive discussion of best practices in succession planning, as guided by observation of programs developed in the corporate sector and, where available, of those developed for higher education.
Introduction

The term “succession planning” has taken on various meanings, sometimes referring to what can be described as an “emergency response plan” for the sudden loss of leadership due to illness, death or unplanned resignation. In other cases, the term may be used to describe a specific search for a candidate to fill a vacant position. However, succession planning is most generally understood to refer to a long-term framework for developing replacements for senior positions upon the planned departure of the incumbents. While this planning may include prospecting for outside hires, succession planning commonly places emphasis on the development of internal candidates. Through training programs or “career ladders,” junior personnel are led through higher-responsibility positions in anticipation of their advancing to the upper echelons of an organization’s leadership.

As will be discussed in this report, succession planning in higher education is a fairly new issue, and while many institutions possess some sort of system for replacing leaders, few have implemented a formal succession planning program. However, the visible benefits of having a system in place to manage the replacement of institutional leaders and to cultivate internal talent have prompted many postsecondary institutions to begin developing such programs.

In this report, we provide an overview of best practices in succession planning. Following this introduction, the second section of this report explores the use of succession plans in higher education, as well as the challenges faced by institutions as they seek to develop succession planning programs. This is followed by a discussion of best practices in succession planning, as guided primarily by observing programs developed in the corporate sector, where succession planning is most common.

---

Succession Planning in Higher Education

Generally speaking, succession planning is not widespread within higher education. In fact, one article describes it as “almost unheard of.”

This is a cause for concern for many postsecondary institutions as, according to the American Council on Education (ACE), “nearly half of the Presidents and Chancellors at U.S. and European Colleges and Universities” are over 60 years old and, for many, their retirement is approaching quickly.

Succession planning represents a viable approach for institutions to maintain effective leadership during inevitable periods of transition. Indeed, in a recent piece for the Chronicle of Higher Education, leadership succession expert Dennis Barden states that “the time has come for succession planning in higher education.” This is indicated not only by the impending retirement of university leaders, but by a number of reports illustrating that “the pipeline of potential leaders in academe… is less than robust.”

Despite this imperative, one study of succession planning in higher education conducted by John J. Heuer of the University of Pennsylvania in 2003, found that among the elite, so-called “Ivy-plus” institutions, none had implemented a formal succession plan. However, most of these institutions had programs that could be integrated into a succession plan (e.g., assessment and training protocols).

Heuer’s interviews with chief human resources officers (CHROs) at the subject institutions identified a number of perceived impediments to succession planning in higher education, many of which stem from higher education’s fundamental differences from the corporate world where succession planning first appeared.

Many of the CHROs interviewed by Heuer suggested that administrative staff in higher education take a lower priority than faculty and students, which leads to the kind of underfunding and inattention to staff development that makes it difficult to develop a “bench” of talented underlings ready to assume top positions. Conversely, they felt that many administrative staffers in higher education do not have the career drive of employees in the private sector and fail to seek the kind of advancement and development necessary to prepare for the top jobs. Such factors have led to a

---

3 “Next in Line? The Succession Planning Debate,” The Presidency, Fall 2006. findarticles.com/p/articles/mi_qa3839/is_200610/ai_n17192013/
6 Ibid.
7 The institutions studied were Chicago, Columbia, Cornell, Harvard, MIT, Stanford and Yale.
8 Heuer, J. “Succession Planning for Key Administrators at Ivy Plus Universities,” University of Pennsylvania Graduate School of Education (Dissertation), 2003.
widespread conception in higher education that external hiring, rather than the development of internal candidates, is the best way to fill senior administrative positions. Indeed, it has been suggested that external hiring is superior to internal hiring precisely because it offers institutions a chance to achieve what they cannot through internal development. As Barden opined in the Chronicle, an open search for external candidates is “one of the only ways that our traditional colleges and universities can achieve an influx of new ideas and approaches.”\(^9\) However, as noted by Barden, conducting an open search to fill leadership positions also has the costly drawback of “disenfranchising worthy internal candidates.”\(^10\) To avoid this scenario, institutions should consider expanding succession planning programs in order to identify and promote talented internal candidates.

Even if succession planning does not produce an internal successor for every senior administrative position, it can produce other positive results: it forces an institution to take stock of its administrative personnel and to devote attention and resources to the career development of its staff, which can both improve the quality of current staff and attract a higher quality of new applicants. As Heuer notes, many potential applicants “shy away” from institutions that appear to lack “organizational commitment and opportunity for further development and career growth.” Institutions can address this issue through the implementation of employee development plans, a tool that effectively demonstrates the value an institution places upon its employees. According to Heuer, when an institution values “people assets,” it can have a “positive compounding effect.”\(^11\)

Fortunately, realization of the importance of succession planning appears to be taking root within higher education. A 2008 survey conducted by education executive search firm Witt/Kieffer found that succession planning is “gaining support” among postsecondary institutions.\(^12\) Results indicated that nearly 75% of responding institutions “practice succession planning in some capacity.”\(^13\) One such respondent reported being “alarmed” upon realizing that “almost all of [its] key positions would be eligible for retirement” within a five-year period. This led to the implementation of a

---

\(^10\) Ibid.
\(^13\) The survey yielded a total of 135 respondents, all of which were “college and university presidents and board members.”
“comprehensive leadership development program” at the institution.

At institutions where some form of succession planning is in place, it is most often focused upon the replacement of board members and presidents/chancellors. The Witt/Kieffer survey indicated that, at these levels of leadership, institutional culture makes succession planning more feasible. Meanwhile, the most common succession planning practices reported were related to “identifying and nurturing internal leaders.” These practices included:

- Planning leadership transitions well in advance of the actual event;
- Considering methodologies other than open searches (e.g., internal promotions) to fill key leadership positions; and
- Creating or further developing a process of orienting and nurturing new leaders ("on boarding" in the acceptance parlance) that plans and executes a smooth and successful transition for the new leader.

Despite reported use of these practices, the survey also underscored the many obstacles in the way of higher education’s movement towards widespread succession planning. The survey results reinforced the fact that many higher education leaders report a “negative perception” attached to “proactively identifying successors” because of deeply ingrained beliefs that the replacement of departing leaders must involve “an open, public search.”

Another dilemma is ensuring that an institution’s succession plan is aligned with its diversity-related initiatives. As one of Witt/Kieffer’s respondents noted, “[m]any institutions do not have a diverse work force from which to attract diverse leaders.” Indeed, at institutions where staff diversity is already a concern, building a succession planning program may exacerbate these problems if the diversity of leadership is not taken fully into account. However, the development of a succession plan can also provide a needed opportunity to implement progressive, diversity-related policies and practices.

Meanwhile, institutions may also find that the process of implementing a succession plan is complicated by “shared governance” systems. One university president described this problem for the survey:

---

15 Ibid., 2.
16 Quoted verbatim from: Ibid.
17 Ibid.
18 Ibid.
With our system of ‘shared governance,’ in which there are legally prescribed roles for the regents, the system president, the faculty, the non-faculty staff and the students, it’s impossible for any administration to do the sort of succession planning that is common in private organizations.\(^{19}\)

Therefore, any succession plan developed at a higher education institution must **take into account the institution’s governance system**, ensuring that the plan for replacing leaders does not upset the governing structures and systems in place.

While these insights may help to provide overall guidance in the creation of a succession planning program, **no clear higher education model of succession planning exists**. As indicated throughout this section, in higher education the most common method of replacing institutional leaders continues to be an “open search” for candidates. Due to the lack of a single model, we must observe a variety of succession planning discussions to determine effective practices. This means also looking to the corporate sector to find comprehensive guidance for succession planning. Indeed, Heuer and other authors such as Jonathan Clunies,\(^{20}\) who have **recommended the adoption of succession planning in higher education**, have relied upon **corporate models**, making such suggestions for modifications as seem appropriate. The following section summarizes this approach to succession planning as described by higher education-oriented authors.

\(^{19}\) Ibid., 3.

Best Practices in Succession Planning

As indicated by the many challenges of implementing succession planning programs in higher education discussed in the previous section, it is clear that institutions must proactively set about changing the perceptions and removing the cultural roadblocks that stand in their path toward succession planning. Fortunately, there are many ways for institutions to move forward with the development of a succession planning program despite the challenges they face.

In addition to identifying some of these challenges, the Witt/Kieffer survey was able to distill a set of generally effective practices for implementing succession planning programs. Among these insights, it was found that the importance of transparency in the succession process was paramount. Succession plans were also most effective when they allowed for full participation of institutional leadership in the process, by establishing structures for the evaluation and approval of replacements by these leaders. According to the survey, succession plans also benefited from integration with an institution’s overall professional development program.

Meanwhile, again for the Chronicle, Barden identified three “central components” of an effective succession planning program. First, such a program “must identify potential leaders, train them, and supply them with real world experience.” Developing internal leaders is essential, but it comes with the unfortunate reality that these leadership-ready individuals may also be prepared to take such positions outside the institution. Second, the program must anticipate vacancies and establish “protocols” for finding replacements, a process which may or may not include an open search for worthy candidates outside the institution. Finally, the succession plan must ensure a smooth transition, so that new leaders get “off to a positive, productive start.”

As stated in the previous section, it is clear that succession planning in higher education is well behind the developments that can be seen in the corporate sector. It follows that higher education institutions have much to learn from companies who have successfully implemented such programs. One executive search firm, IIC

---

Partners, has explored some of these lessons.\textsuperscript{23} The first lesson is that succession planning must go beyond simple identification of internal leaders; it must establish “a broad strategic roadmap for the future leadership development and talent development of the organization.” Effective succession plans in the corporate sector also utilize broad definitions of talent in order to cultivate a deep and diverse pool of leaders within the organization. This is especially important given the increased globalization of higher education. Successful programs also go beyond simple candidate identification by implementing strategies that “ensure continued success” of those in leadership positions. At successful companies, this is often a focus of “formal leadership development programs.” Succession planning at successful companies also benefits from a consistent and dedicated budget; even in the face of stark financial conditions, devoting funds to internal leadership development is a central way to maintain organizational stability. Finally, succession planning should be addressed at “all levels of the organization” in order to build a “robust infrastructure” of leaders.

With these broad lessons in mind, in the subsections below we explore in greater detail best practices for succession planning in higher education, as informed by corporate practices.

Support of Leadership

In corporate succession planning, an effective program begins with the support of the CEO and other top management. In addition, the particular nature of succession planning requires that senior executives be aware of and involved in the development of their successors.

Jonathan Clunies suggests that, within higher education, this principle may reasonably be extended to include any constituencies which would normally be represented on the search committees used to find candidates for the president’s office or other senior positions.\textsuperscript{24} Trustees, faculty, alumni or other groups need not necessarily be involved in the details of succession planning, such as the training and development of junior administrators. However, their input can be obtained (e.g., about what competencies they consider important for successor candidates to develop), and at a minimum they can be informed of the plan’s existence and its progress.

Alignment with Organizational Structure and Strategy

The design of the succession plan itself should be tied to organizational strategy, and tailored to fit the organization’s particular needs. In the corporate world, for

\textsuperscript{23} IIC Partners, “Higher Education by Succession Planning. www.iicpartners.com/web/pagecontent_fasp?sid=77
\textsuperscript{24} Clunies, Op. Cit.
instance, smaller, less complex companies will have succession plans different from those at larger companies, both because their needs are different and because smaller companies have fewer resources to devote to succession planning. In another example, fast growth companies will have different succession needs than mature organizations; while the latter may be able to replace current leaders with much the same kind of person possessing much the same kind of skills and background, the former will probably see its needs changing so rapidly that it needs to change not only the individuals holding positions, but the profiles of the positions themselves.

Likewise, colleges and universities can tailor a succession plan to their organizational profile and strategy. A small liberal arts college may not have the administrative complexity to provide junior personnel with enough experience to assume the top jobs, so it could encourage young administrators to pursue mid-level or upper-mid level positions elsewhere, at larger institutions, before returning to assume the senior positions at the original school (or, at a minimum, anticipate and tolerate this career path). At a larger university, this problem may be seen within the constituent colleges and schools. Heuer’s study of succession planning at Ivy-plus universities found that the relatively flat, “siloded” structure of the modern research university makes succession planning for these institutions particularly difficult. As the chief human resources officer (CHRO) of one of the participant institutions noted:

The decentralization and autonomy creates a territorialism. Some schools feel better connected to the whole, but certain schools take great pride in the disconnect and essentially recruit and retain their own staff. There is generally not a practice of transfer across the university, but unstructured individual movement does happen across the schools.  

This fragmentation makes it difficult to track and develop personnel who may have the potential to assume university-wide leadership positions. Thus, part of the succession planning of a large university could be to require school deans annually to identify up-and-coming administrators, and to transfer them among schools or to the central administration as necessary for their career development. Similarly, a university’s succession plan must reflect whether it is growing or stable – will future leaders require substantially the same competencies as the current generation, or will the profiles for the senior administrative positions be changing as the institution changes?

---

Surveying the Institution

Succession planning must reflect these institutional characteristics, so it is recommended that the development of a plan begin with a survey of the organization and of the needs which it seeks to fill through succession planning. How is the institution organized and how do personnel currently move through its units as their careers develop? Which positions will the succession plan be designed to supply? What programs or structures are already in place that may be incorporated into succession planning (e.g., assessment protocols, training and development modules)? Although Heuer found that none of the Ivy-plus institutions in his study had a formal succession plan, most of them did have existing programs and protocols which could contribute to succession planning, such as development initiatives for young administrators.26

This institutional survey, intended to align the succession plan with organizational strategy, would then be followed by the development of a demographic and professional profile of the institution’s present staff: how well positioned is the staff, in its present form, to fulfill the succession plan? As Heuer reports in his study, “[s]uccession planning is difficult, but can be even more difficult if the organization does not have good demographic data on its key staff.” This profile would include a very “solid understanding of existing internal demographics by job family and grade and some understanding of future business needs.”27 Although it may be impossible to project these future needs precisely, data on the age and career patterns of the existing internal workforce, supplemented by information on external trends (e.g., regional workforce, higher education labor market), can give some idea of how prepared the institution is to produce successor candidates and where any gaps may lie.

The succession plan itself will attempt to match the demographic and professional profile of the workforce with the needs identified in the institutional survey. Although it may be desirable to have a formal succession plan setting forth the steps to achieve this, the plan itself must remain flexible enough to incorporate any changes to institutional strategy. In the corporate context it has been suggested that succession planning must be “an ongoing process like the business planning itself.”28 It may even make sense to incorporate succession planning as a sub-category of strategic planning, so that it will have to be addressed any time the strategic plan itself is considered. The key element to be considered in structuring a flexible succession plan is that the competencies required in the positions to be filled may change as the institution’s strategy changes. Ideally, the succession plan, as drafted, will foresee these changes (e.g., the planned addition of new units such as

26 Ibid., 54.
27 Ibid., 67.
28 Leibman, M.S. and Bruer, R.A. “Where there’s a will there’s a way.” Journal of Business Strategy, March/April 1994, qtd. in Clunies.
professional schools, planned enrollment growth), which is indeed one of its key functions, but any unforeseen change in the institution’s goals and orientation will have to be addressed by revisions to the succession plan as well. One business tactic that may help colleges and universities to plan ahead and give the succession plan durability is the development of “competency profiles,” which look ahead to what certain positions will require in one, three, and five years.29

Identifying Future Leaders

Matching the current profile of the institution’s workforce with its prospective requirements leads naturally to the identification of specific individuals who may be suited to succeed to top management positions, whether with or without further development and training. Although very little data exists on how colleges and universities go about this process, one study found that in a small sample of institutions, “periodic human resources review meetings typically provide the forum for identifying superior employees and planning for their development.”30 This “review meeting” has extensive precedent in the corporate world as well. The advantage of the review meeting seems to be that it provides a forum for the involvement of top management and, through open discussion of individual candidates, leads more decisively to specific actions (e.g., job promotions or transfers, encouraging a candidate to pursue more education or training). Periodic meetings for the purpose of creating and updating profiles on specific candidates also help to remind top management of the succession plan and its importance.

For large corporations with multiple units, it has been suggested that company-wide review meetings should be held in which unit managers pool their recommendations of high potential individuals, on the premise that this prevents a narrow view of talent development, in which individual units try to be self-sufficient in their hiring and development of staff. As an obvious antidote to the problem of silos and fragmentation identified in Heuer’s study of Ivy-plus institutions, Clunies recommends that “[i]n higher education, such convocations of administrators could allow for potential inter-divisional job movement for increased efficiency.”31

Review meetings are an effective forum for identifying and tracking high potential successor candidates, but on what basis should individuals be nominated for these positions? The first step, already alluded to, is the creation of competency profiles which set forth the skills and experience needed to take on the target positions. These competency profiles, sometimes called “action profiles,” should consist of “a description, in behavioral terms, of the managerial

29 Spoor, J. “Succession planning: Once a luxury, now an emerging issue.” HR Focus, 1993, qtd. in Clunies.
capacities, skills, and personal qualities required in a particular position.” These competency profiles then provide the tool for the second step, which is the evaluation of the current performance of individual employees as measured against the competency profile. This is important because high performance in one position does not guarantee success at a higher level of the organization. One search firm professional cites the example of an internal candidate who, greatly admired by the search committee, gave interview answers “with great specificity” which demonstrated an impressive grasp of operations, but not any depth of analysis: “What the committee members realized immediately was that she had failed to transcend her current job – which was all about tactics – and move to the strategic level where executive leadership lives.” It should be noted that, although an otherwise impressive internal candidate may not measure up to the competency profile at present, part of the role of a succession plan can be to help high performers at lower levels develop the skills – through expanded job roles, further education, or training – which will allow them to rise effectively to the target positions.

The assessment mechanisms used will vary depending on the organization’s needs and culture. Clunies suggests that an important consideration for colleges and universities may be to remove any “cultural obstacles” to assembling objective, accurate data on employee performance. Some colleges and universities may already have effective assessment tools for administrative staff, while others may lag in this area. If effective modes of performance assessment are not already in place, implementing these would be an important preliminary step. One popular assessment method cited by Heuer is the “360-degree evaluation,” which collects input from the employee’s peers and direct reports, rather than relying only on the supervisor’s perspective. This method can be particularly helpful for evaluating successor candidates for top management positions. A candidate may produce effective results from the perspective of his supervisor, but if these are achieved at the cost of poor relations with his colleagues and subordinates, it may be doubted whether he has the leadership and interpersonal skills to assume a top role.

A simpler tool recommended by Heuer is the succession planning worksheet, which can be a useful assessment starting point in developing the succession plan. Such a worksheet would ask top managers (e.g., the heads of all units) to identify “direct reports, their positions, their performance, their risk of exiting the organization, recommended successors (primary and secondary), future positions the employee may be interested in, and the supervisor’s evaluation of the readiness of the individual.”

---

Communicating Expectations

The identification of specific individuals as successor candidates raises the question of how involved these employees themselves should be in the succession plan. Heuer suggests that successor candidates should be informed of their status, based on the premise that “communications problems may doom effective succession planning. Plans often fail because they do not include the career needs or interests of employees. In many organizations, the succession process is very mysterious.” In other words, insofar as employee cooperation is necessary to retaining and developing successor candidates, those candidates will have to be informed of the succession plan. This does not come without a downside, however. At one Ivy-plus institution studied by Heuer, a prototype succession plan was developed in the form of “a network of problem solvers for developing programs and managing issues,” which functioned as a sort of management training school in which successor candidates were exposed to strategic issues facing the institution. Unfortunately, the program:

…created excitement and raised expectations that, according to the chief human resources officer, ‘could not be delivered … it seemed like a commitment to folks.’ The institution was not ready and has since backed away from the program as a development tool for the next level of leaders.

The lesson seems to be that, in succession planning, half-measures are counterproductive. Although inclusion in a succession planning regime should never be seen to confer infallibility on successor candidates – the “heir apparent” syndrome – there should be a commitment to seriously consider for senior positions any candidate who continues to perform and develop in such a way that they meet the relevant competency profile. One solution to this problem from the corporate world, which Clunies suggests is particularly well-suited to higher education, is the use of teams of successor candidates:

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.

In addition to muting the expectations of individual candidates that they are “the one,” the use of teams develops an even deeper “bench” of

---

36 Ibid., 9.
37 Ibid., 56.
administrators who can take on senior roles, even if it is not one for which they were originally aiming. A group of vice presidents being groomed for the presidency, for instance, provides an instant talent pool to draw upon for other, unexpected vacancies (provost, school deans, etc.).

Developing Leaders

Once a group of high potential employees has been identified, a succession plan must make provisions for their development. The development of high potential employees is an element of succession planning which is often neglected in favor of mere identification and assessment, but the National Academy of Public Administration has suggested that development, rather than being tacked on to succession planning as an afterthought, should actually precede the selection of specific candidates. By developing groups of high-potential employees together, organizations can observe the emergence of the best successor candidates. Clunies sees in this a similarity to his recommendation to use teams of candidates, in that, for instance: “By educating all suitable deans, a prospective provost may surface.”

It is important that any employee included in succession planning should have an “individual development plan (IDP), which outlines planned activities that will help narrow the gap between what the individuals can already do and what they should do to meet future work requirements of one or more positions.” These plans will provide for the three major categories of (1) work experience and assignments, (2) coaching, and (3) educational courses and seminars. Although further education and coaching are important, they are perhaps the most obvious paths of development. What may be less obvious is the importance of job assignments to eventually producing effective senior leaders. As much as possible, high potential individuals should receive challenging job experiences, such as task forces, job rotations, line switches, and turnaround or fix-it assignments. Moving a young manager through the various aspects of a business – sales, distribution, finance, human resources, and so on – is a common tactic in the corporate world, but one without as much hold in higher education. Clunies suggests that it at least be considered at colleges and universities:

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?

39 Ibid.
40 Ibid.
41 Ibid.
One obstacle to this method, not unique to higher education, is that it may require the deliberate assignment of individuals to jobs for which they are not fully qualified, at the expense of the short-term interests of the organization. These so-called “stretch assignments” can be challenging, but they serve as both excellent development opportunities and as a test of an employee’s mettle – whether they have what it takes to succeed at higher levels of the organization where they will likewise find themselves “stretched.” At some corporations, such as Citigroup, this practice is formalized in the assignment of high potential young managers to jobs for which they are no more than sixty to seventy percent qualified.42 Job rotation should not, however, happen so quickly that the individual does not have a chance to respond to the challenge and derive developmental benefit from the assignment; two to three years is suggested as standard duration in the corporate world.

Assessing the Succession Plan

Finally, succession planning must be accompanied by some sort of assessment of the plan itself and of its outcomes, including its development aspect. In the corporate sector this is often achieved through an annual review, which updates the succession plan, including the participation of specific individuals, sets forth the development goals for the next twelve months, and reviews whether the development goals of the past year were completed by plan participants. To ensure accountability, it may be advisable to produce an annual report on succession planning. Because the process can easily become vague and open-ended, an annual report lends it tangibility and visibility, which aids accountability. Such a report may include statistics such as the number of successors who actually assumed jobs for which they were targeted, the number of jobs filled from a pool of candidates, or the number of candidates who have completed developmental goals. Broader institutional measures such as the number of positions filled internally or time-to-fill for vacant positions can also be useful as they set succession planning in a broader context.

42 Ibid.
Conclusion

While for many years succession planning in higher education has been “almost unheard of,” research indicates that more and more institutions are recognizing the importance of creating a succession plan to address the impending retirements of their leaders.\(^{43,44}\) As detailed throughout this report, institutions face a number of obstacles on their way towards successful implementation of such programs. Chief among these obstacles is the widespread assumption in higher education that the best way to replace departing leaders is through an open search for talented candidates. Included among other obstacles is the fact that institutions must balance succession planning with staff diversity concerns and must ensure that such programs can coexist with governance structures. Despite these issues, the potential damage caused by leadership voids at these institutions creates an imperative for succession planning.

A model for such programs does not appear to exist for higher education institutions, but guidance can be found by observing effective programs in the corporate sector. These programs begin with the full support of an organization’s leadership, and are purposefully aligned with an organization’s structure and strategic outlook. To accomplish this, we recommend a survey of the institution to determine the needs that must be met by a succession plan. From here, the institution can set about developing a system for identifying talented individuals within the organization, and designing a program to develop the leadership abilities of these individuals as they rise through the institution. Throughout this process, it is vital for the institution to maintain transparency and a spirit of participation throughout the organization. Finally, a succession planning program must be assessed regularly by the institution to ensure its effectiveness.

Project Evaluation Form

The Hanover Research Council is committed to providing a work product that meets or exceeds member expectations. In keeping with that goal, we would like to hear your opinions regarding our reports. Feedback is critically important and serves as the strongest mechanism by which we tailor our research to your organization. When you have had a chance to evaluate this report, please take a moment to fill out the following questionnaire.


Note

This brief was written to fulfill the specific request of an individual member of The Hanover Research Council. As such, it may not satisfy the needs of all members. We encourage any and all members who have additional questions about this topic – or any other – to contact us.

Caveat

The publisher and authors have used their best efforts in preparing this brief. The publisher and authors make no representations or warranties with respect to the accuracy or completeness of the contents of this brief and specifically disclaim any implied warranties of fitness for a particular purpose. There are no warranties which extend beyond the descriptions contained in this paragraph. No warranty may be created or extended by representatives of The Hanover Research Council or its marketing materials. The accuracy and completeness of the information provided herein and the opinions stated herein are not guaranteed or warranted to produce any particular results, and the advice and strategies contained herein may not be suitable for every member. Neither the publisher nor the authors shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages. Moreover, The Hanover Research Council is not engaged in rendering legal, accounting, or other professional services. Members requiring such services are advised to consult an appropriate professional.