

SUCCESSION PLANNING

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SUCCESSION PLANNING

- **High potentials**, also known as “top talents ”or “accelerated candidates” are believed to have the best chance to rapidly grow their capabilities and fill strategic roles in the near future. Also, referred to in some areas as to “ grow your own” within your system. This can represent a critical investment of time and resources.

SUCCESSION PLANNING

There are four different criteria to identify high potential candidates.

- Due Diligence
- Clear Criteria
- Accurate Data
- Careful Decision-Making

SUCCESSION PLANNING

Best Practices for making the right talent investment in your school system:

- Don't shortchange high potential nominations
- Narrow your pool before you start rating
- Define potential consistently
- Separate potential from performance from readiness
- Involve team members in the process

DON'T SHORTCHANGE HIGH POTENTIAL CANDIDATES

Create Focus and Rigor by ensuring that the managers involved in the candidate review have:

- Clear direction for evaluating and the nomination of high potential candidates
- An accurate definition to guide discussion and decision making
- Adequate rating process and instructions

DON'T SHORTCHANGE HIGH POTENTIAL CANDIDATES

The evaluation and nomination of potential high performers is often embedded as a component of a larger talent review process, and doesn't always get the proper emphasis. Once candidates have been initially evaluated, try and engage team members in a more thorough evaluation and consensus. You need to ensure you have the right quality and quantity of high-potential talent.

NARROW YOUR POOL BEFORE YOU
START RATING

Focus on the prospective high-potential candidates. Once you have the pool of candidates, employ needed criteria, tools, and consensus-building techniques for the required due diligence to make the best investment decision for your school system.

NARROW YOUR POOL BEFORE YOU
START RATING

Keep the evaluation process zeroed in on the **high-potential** designation, this will help keep the interview team focused on maintaining their time and attention on those leaders eligible for this in-depth consideration.

DEFINE POTENTIAL CONSISTENTLY

Replace loose, intuitive definitions of potential with standard, research-based factors that are predicative of future potential.

DEFINE POTENTIAL CONSISTENTLY

- | | |
|-------------------------------|---------------------|
| Propensity to Lead | Culture Fit |
| Brings Out the Best in Others | Passion for Results |
| Authenticity | Adaptability |
| Receptivity to Feedback | Conceptual Thinking |
| Learning Agility | Navigates Ambiguity |

DEFINE POTENTIAL CONSISTENTLY

A candidate must first confirm a solid track record of past performance. The use of the 10 factors in the previous slide are the real differentiators for potential in an accelerated development. Taken as a whole, they address motivations, learning orientation, and the propensity to deal with ambiguous, complex and dynamic nature of strategic roles.

Motivation + Learning Orientation

SEPARATE POTENTIAL FROM PERFORMANCE FROM READINESS

- The three concepts of potential, performance, and readiness are often confused
- Potential – The likelihood that a candidate can develop into a successful leader with significantly expanded, higher level leadership responsibilities.
- Performance – A candidate’s level of success in executing objectives in their current (past) roles. Includes demonstration of required competencies.
- Readiness – The degree to which a candidate’s experiences, knowledge, and personal attributes meet the requirements for the role or job family.

SEPARATE POTENTIAL FROM PERFORMANCE FROM READINESS

- Remember, past performance is an indicator for future performance, but only when the challenges and roles remain consistent. Since significantly new and different challenges lie ahead for “high potentials”, it is critical to differentiate and evaluate potential and readiness.

INVOLVE TEAM MEMBERS IN THE PROCESS

Engage leaders and team members from the very start of the process. Communication is vital to attain buy-in, set expectations, and establish processes, roles, and accountabilities. Remember to include the importance of the time-line of hiring and cross-training. Not everyone understand the significance of effect cross-training.

INVOLVE TEAM MEMBERS IN THE PROCESS

- Team members, can serve as guardians of the system’s talent. They can serve as “scouts” at different times during the year bringing potential candidates to your attention. By adopting the language and definitions into their observations and dialogue on a consistent basis, team members will be better equipped to spot potential candidates more proactively. This could mean uncovering potential talent that might not be discovered by only thinking of potential candidates once a year.

TIME-LINE FOR EFFECTIVE HIRING

- Mentoring and training of a new position is essential to the operation of the school system. If the training starts too late it leaves the department vulnerable to events beyond your control.

TIME-LINE FOR EFFECTIVE HIRING

Creating and Implementing a Successful plan is paramount to yield successful results.

- Identify the specific task for which training is needed
- Identify the proper people who will be capable of performing the training tasks. Match the skill set and learning capability of the potential candidates with the skills of a required position
- Schedule adequate funds, time, training materials, and facilities to accomplish the training.

TIME-LINE FOR EFFECTIVE HIRING

- Remember that cross-training potential candidates from within represents an excellent way to cultivate leadership within the organization.
- Morale is big in this economy and employees that believe they are valued will work harder.
- Cross-training within the system promotes efficiency and can help to maintain staying in the budget.

Training employees, including the leaders, to take on functions other than their own will help to achieve operational readiness, while promoting teamwork among employees across the department

TIME-LINE FOR EFFECTIVE HIRING

Depending on the role of the upcoming position will determine the length of the training process.

- CSFO – 3 to 6 months
- Accounting/Local School Specialist – 3 to 6 months
- Payroll Specialist – 3 months
- A/P Bookkeeper – 3 months
- Local School Bookkeeper – 3 months

It may not be feasible to cross-train with existing employees so cross-training within the department is a wise investment.

RECAP

- Making the right talent investments in your system
- **Best Practices**
 - Don't shortchange high potential candidates
 - Narrow the pool before you start rating
 - Define potential consistently
 - Separate potential from performance from readiness
 - Involve team members in the process

RECAP

- The high potential identification is vital to filling a system's leadership roles.
- This nomination process represents an investment decision.
- Time, budgeted dollars, and energy need to be invested in assessing, coaching, awarding assignments, and retaining high candidates.
- The due diligence and response to common design and challenges will help determine the return on the "high potential" investment.

RECAP

Creating and Implementing a Successful plan is paramount to yield successful results.

- Identify the proper timeline for planning purposes.
- Schedule adequate funds, time, training materials, and facilities to accomplish the training.
- Cross-training from within is an excellent way to cultivate potential leadership.

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