

Succession Planning

Pamela A. Gordon • Julie A. Overbey
Editors

Succession Planning

Promoting Organizational Sustainability

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To Connor Anthony Gordon, the Gordon family's succession plan.

All my love.

P.A.G.

*To my brother Thomas Keenan and my sister Linda Bayes. You are my
heroes and I love you both.*

J.A.O.

INTRODUCTION

“He who fails to plan is planning to fail.” This quote, and others similar to it, are attributed to Benjamin Franklin, Winston Churchill, and author Alan Lakein. Regardless of the source or version, the statement is an apt introduction to the consideration of succession planning. The lack of a sophisticated and comprehensive succession plan for an organization can lead to confusion, turmoil, and in some cases cessation of the business.

It is not only one type of business that requires careful succession planning. Leaders in all types of organization including for-profit, non-profit, healthcare, governmental, and educational institutions need a clear path to select, develop, plan and promote new leaders. The authors contributing to this book have considered the many elements of succession planning, the varying environments, associated challenges, and rewards accompanying it. The examples in this book are all related to succession planning efforts within the United States of America and based upon current American business practices.

In Chap. 1, Kevin Bottomley introduces the concept of sustainable leadership as an interdisciplinary method to accomplish succession planning. The concept of sustainable leadership provides a framework for leaders to develop specific strategies and tactics to address the long-term needs of the organization. The chapter contains vignettes to help clarify specific points.

Irina Weisblat provides a literature review in Chap. 2 that considers theoretical foundations, research on the topic, and best practices. This chapter also illuminates strategies and tactics for the development of future leaders.

In Chap. 3, Rick Johnson, Donna Pepper, Joan Adkins, and Alexius Emejom discuss succession planning from themes that emerged from

document data. Their goal was to identify succession processes and strategies that assist candidates with future succession, such as value-added competencies, specialized knowledge, leadership capabilities, and performance-based success.

Joseph Keller focuses on the implications of succession planning management in Chap. 4. He emphasizes the concept that succession management includes recruiting, talent management, employee training, and employee retention. He demonstrates how management at all levels is integrated into the succession planning process.

Suzanne Richins emphasizes the critical need to support talent development of professionals in the healthcare industry in Chap. 5. She also explores how leadership training programs are used as part of a succession planning process.

In Chap. 6, Donna Kjellander examines succession planning for the small business. She analyzes the options for a family owned business for succession planning related to exploring and handling family dynamics, and whether to consider an internal or external candidate, along with recommended ideas for training the future successor.

Lillie Hibbler-Britt and Anna Wheatley investigate succession planning as it relates to family-owned businesses through a review of literature and discussions with family-owned business presidents. Chapter 7 focuses on the factors that affect the ability of family-owned businesses to participate in succession planning by concentrating on a comparison across countries and gender.

In Chap. 8, Sofia Loomis presents succession planning practices in a federal agency. The author's case study provides insight on how succession planning occurs within the Department of the Navy to adequately facilitate the forecasted high number of retirements and retirees' knowledge transfer between 2016 and 2021.

Luis Gallardo's Chap. 9 reveals the impediments to succession planning caused by variables such as politics, stakeholders, intra-organization disjuncture, demographics, and legal constraints. He offers recommendations to ultimately improve public sector succession planning.

Succession planning within the business information technology (IT) arena is presented in Chap. 10 by Loyce Chithambo. A warning is expressed throughout the chapter that without proper succession planning and solid data preservation strategies companies are at risk of losing the knowledge acquired by experienced business information technology individuals and teams.

In Chap. 11, Tony Ray Ruffin focuses on reviewing succession planning strategies for leaders in healthcare organizations. The goals of this chapter are to identify common themes and strategies for best practices in the twenty-first century to educate and assist potential, current, and future leaders in healthcare organizations using succession planning for continued growth and future development.

Cheryl Anderson introduces the feminist perspective of implicit bias in succession planning in healthcare in Chap. 12. While more women work in health care than men, there is gender inequality with more men in leadership roles. The current systems in place tacitly endorse males rising to leadership roles supported by succession planning beliefs. The chapter explores disruptive leadership, or not following the status quo, which may be more beneficial to healthcare organizations.

In Chap. 13, Tamara Reeves considers research-based best practices and perspectives on the need for small business owners to engage in succession planning within the healthcare sector from a practical perspective. The author presents known barriers for succession planning within the healthcare sector for small business owners and recommendations for overcoming them from the perspective of a small business owner.

Lili Melton's Chap. 14 contains a rationale for kindergarten through higher education (K12–HE) succession planning research to be grouped in one educational framework, Planning, Recruiting, Empowering, Preparing, Guiding, and Off to work (PREPGO). This framework for the educational sector is an approach to assist leaders with organizational sustainability and to promote solutions to educational challenges.

Case studies in succession planning for K-12 school districts are presented by Arfe Yucedag-Ozcan and Sharon Metcalfe in Chap. 15. Research supports the claim that strong and stable leadership is one of the fundamental elements that influence school effectiveness and student achievement.

Vernesia Wilson's Chap. 16 offers empirical studies that address succession planning models/maps, ethical considerations, and best practices for utilizing these models within employment sectors. Results from the collected data may help guide organizational activities and strategies related to retaining employees while also planning for succession.

In Chap. 17, Anthony Carbo and Karin Storm promote ethics as a vital component of positive succession planning. Throughout the chapter, the authors posit that prospective leaders should be transparent about the general moral principles they believe should take priority.

Paul Wendee, Fiona Sussan, and Ravi Chinta provide the epilogue to succession planning in Chap. 18. The authors propose a value driver theory approach to understanding the enterprise/shareholder value creation process, which is an integral part of succession management. They describe succession planning as a strategic process and discuss its impact on the value creation capability of an organization.

We hope our readers find this book on succession planning informative and beneficial. The topic coverage that spans the organizational disciplines of business, education, and healthcare makes this a comprehensive tome on the subject. We hope that following the strategies, tactics, and best practices presented here help to formalize the succession planning structure in your organization.

Pamela A. Gordon
Julie A. Overbey

CONTENTS

1	Developing Sustainable Leadership Through Succession Planning	1
	Kevin S. Bottomley	
2	Literature Review of Succession Planning Strategies and Tactics	11
	Irina A. Weisblat	
3	Succession Planning for Large and Small Organizations: A Practical Review of Professional Business Corporations	23
	Rick D. Johnson, Donna Pepper, Joan Adkins, and Alexius A. Emejom	
4	Succession Planning Management	41
	Joseph Keller	
5	Succession Planning in Non-Profit Healthcare Organizations	49
	Suzanne Moss Richins	
6	Succession Planning in the Small Business: The Good and the Bad	63
	Donna M. Kjellander	

7	Succession Planning in Family-Owned Businesses	75
	Lillie M. Hibbler-Britt and Anna Copeland Wheatley	
8	Federal Agency Succession Planning	89
	Sofia G. Loomis	
9	Promoting Public Sector Sustainability Through Participation	105
	Luis Gallardo	
10	Succession Planning Research Within the Business/IT Arena	125
	Loyce Chithambo	
11	Strategies for Healthcare Organizations in Succession Planning	137
	Tony Ray Ruffin	
12	The Feminist Perspective of Implicit Bias in Succession Planning in Healthcare	155
	Cheryl LaFollette Anderson	
13	Are You Preparing a Successor? Succession Planning in a Small, Private Practice, Healthcare Setting	165
	Tamara J. Reeves	
14	Succession Planning Research in the Educational Sector	175
	Lili C. Melton	
15	Case Studies in Succession Planning for K12 Districts	187
	Arfe Yuicedag-Ozcan and Sharon K. Metcalfe	
16	Succession Planning Models, Conceptual Maps: Ethical Considerations and Best Practices	199
	Vernesia Wilson	

17	Preventing Negative Conflict in Leadership Succession: Ethical Considerations and Practices	213
	Anthony R. Carbo and Karin J. Storm	
18	An Epilogue to Succession Planning: Understanding the Value of Your Enterprise	223
	Paul Wendee, Fiona Sussan, and Ravi Chinta	
	Index	239

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LIST OF FIGURES

Fig. 8.1	Retirement Key Player Communication Routing Model (Loomis, 2017)	101
Fig. 16.1	The District Management Council's suggested succession model. This was developed as an example of succession plan development (Hanover Research, 2014)	202
Fig. 16.2	In and Out model contributions. This model indicates how internal and external components shift within succession for an organization (Sarabia et al., 2015)	203
Fig. 16.3	Six-step succession planning map. This provides a six-step process that may be conducted by leaders to examine strategies that lend to retaining employees	206
Fig. 18.1	The Theory of Value Drivers possibilities frontier and value driver chain	229

LIST OF TABLES

Table 3.1	Theme response frequency and frequency percentages	33
Table 14.1	Succession planning framework to promote organizational sustainability: PREPGO	178