

# Succession Planning Panel

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- Meetings and Events  
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38<sup>th</sup> Midyear Meeting  
April 25 – 28, 2024  
Boston, Massachusetts

# Advantages of Succession Planning

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- Protects and furthers organizational knowledge and expertise
- Ensures availability of qualified candidates who are ready to move into leadership positions
- Decreases recruitment and orientation costs
- Promotes smooth transitions and maintains productivity and morale
- Encourages preparation and advancement of individuals who demonstrate leadership potential



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# Replacement Planning vs. Succession Planning

Replacement Planning	Succession Planning
<b>Reactive</b> , short-term solution to identify immediate replacement for an individual who has abruptly left	<b>Proactive</b> , long-term strategy that prepares individuals for advancement
<b>Assumes status quo (present leader is an appropriate model for future leader)</b>	<b>Develops long-term talent pool, numerous individuals with skills to take over role</b>
<b>Present focused</b> - used in emergent situations, may result in a loss of institutional knowledge	<b>Future focused</b> - creates and maintains institutional knowledge pool

Rayburn, W., Grigsby, K., & Brubaker, L. (2016). The strategic value of succession planning for department chairs. *Academic Medicine*, 91(4), 465-468.

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# How to identify positions most in need of succession plans

<p><b>Criticality:</b> Impact of the position on organizations ability to accomplish mission</p>	<p><b><u>Vulnerability:</u></b> No identifiable successor for position, these positions are most vulnerable to knowledge loss</p>			
		<p><b>Low Vulnerability</b></p>	<p><b>Moderate Vulnerability</b></p>	<p><b>High Vulnerability</b></p>
	<p><b>High Criticality</b></p>	<p>Moderate Risk</p>	<p>High Risk</p>	<p>High Risk</p>
	<p><b>Moderate Criticality</b></p>	<p>Low Risk</p>	<p>Moderate Risk</p>	<p>High Risk</p>
	<p><b>Low Criticality</b></p>	<p>Low Risk</p>	<p>Low Risk</p>	<p>Moderate Risk</p>

Chart adapted from Succession Planning: A Step-by-Step Guide, The Workforce Planning and Analytics Section (WPAS), Workforce Support and Development Division (WSDD), Office of Human Resources (OHR), National Institutes of Health (NIH)



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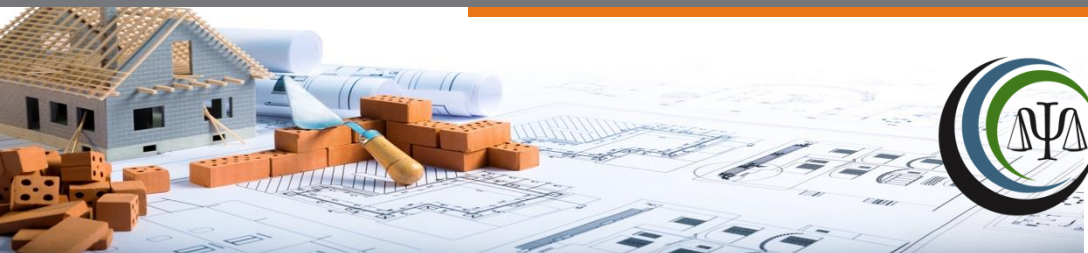
# Organizational Charts to Determine Mission Critical Positions

In Louisiana:

- Executive Director (High Risk)
- In-House Counsel (Moderate Risk)
- Admin Assistant (Moderate Risk)
- Board Chair (Moderate Risk)
- Vice Chair (Moderate Risk)
- 3 Psychologist Board Members (Moderate to High Risk)
- 1 Public Board Member (Low Risk)

	Low Vulnerability	Moderate Vulnerability	High Vulnerability
High Criticality	Moderate Risk	High Risk	High Risk
Moderate Criticality	Low Risk	Moderate Risk	High Risk
Low Criticality	Low Risk	Low Risk	Moderate Risk

**Who would you include on your organizational chart?**



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# Board Member Perspective from Louisiana

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- How do we integrate recruitment of future board members into succession planning framework?
- Ideas from Louisiana:
  - Actively encourage qualified, eligible licensees in the jurisdiction to self-nominate for open seats.
  - Present to state psychology association members about what it means to serve on the board and have an opportunity for Q and A.
  - Distribute call for nominations of open seats widely with a personalized note from the current Chair about what it means to serve.



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# Board Chair Perspective from Louisiana

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For the Chair position, succession planning highly depends on the organizational structure of your Board, how your Chair is chosen and what the term limit is.

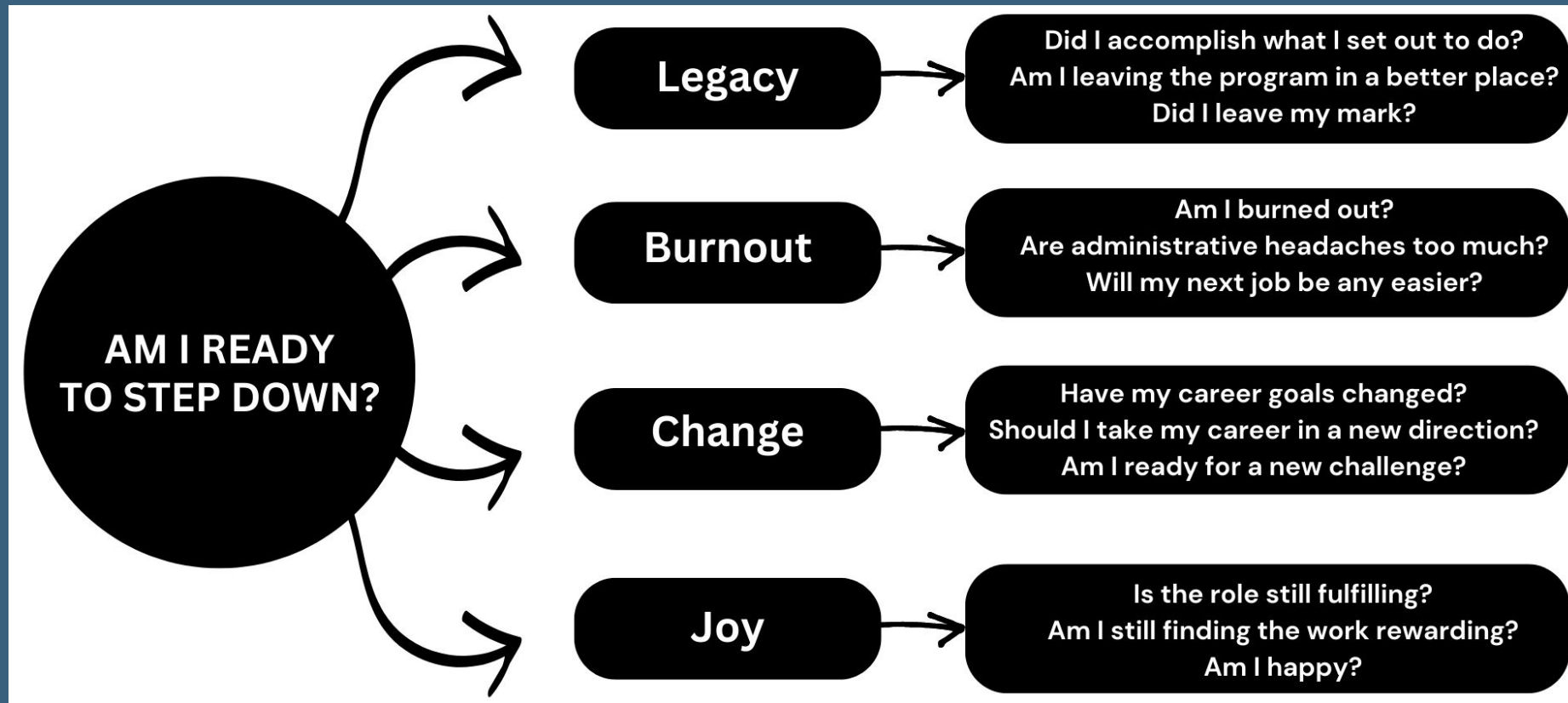
- Current chair should inform Vice Chair of what the role entails since many discussions do not include other members of the Board, and others may not understand how the role differs from a general Board member.
- Individuals interested in serving as Chair should:
  - Be prepared to run an effective meeting and manage group debate
  - Be able to work collaboratively with the Executive Director
  - Understand the level of responsibility involved
  - Approach the role accepting you won't know everything on day one
  - Have humility and understanding of who you are here to serve



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# For roles without term limits: Recognize when it is time to step down



Gisondi, M. A., Hopson, L., Regan, L., & Branzetti, J. (2023). Practical tips for navigating a program director transition. *MedEdPublish* (2016), 13, 3. <https://doi.org/10.12688/mep.19492.1>



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# References

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1. Gisondi, M. A., Hopson, L., Regan, L., & Branzetti, J. (2023). Practical tips for navigating a program director transition. *MedEdPublish (2016)*, 13, 3. <https://doi.org/10.12688/mep.19492.1>
2. Patidar, Nitish, et al. (2016). Succession planning and financial performance: does competition matter?. *Journal of Healthcare Management*, 61(3), 215-227.
3. Rayburn, W., Grigsby, K., & Brubaker, L. (2016). The strategic value of succession planning for department chairs. *Academic Medicine*, 91(4), 465-468.
4. Redman R. W. (2006). Leadership succession planning: an evidence-based approach for managing the future. *The Journal of nursing administration*, 36(6), 292–297. <https://doi.org/10.1097/00005110-200606000-00003>

**Succession Planning: A Step-by-Step Guide**  
from National Institute of Health (NIH).  
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