

Preparing for the Future

September 21, 2017

Michael Lesiecki - *Preparing for the Future: Succession Planning and Related Initiatives*, today's September 21, thanks for joining today. This webinar is being recorded and you'll automatically receive a link to the recording and to the slides.

Webinar Details

Michael Lesiecki - For this webinar you'll be in listen-only mode if many of you know our systems using a computer or phone but please ask questions find that Q&A; window on your system you know WebEx is pretty interesting you can change the screen display you can make it larger or smaller whatever you want you can customize it for yourself. This is brought to you by CCTA that's the Center's Collaborative for Technical Assistance, so what is that.

The CCTA is Led by

Michael Lesiecki - Well first of all its led by five different centers the CTC Center is the lead at Collin College in Frisco Texas and let me acknowledge Christina Titus who works there she runs the background of the systems and is responsible for communicating with you about the webinar so thank you for Christina for all of your work. Also leading the effort is the South Carolina ATE Center; the Florida ATE Center and the PI and leader from that center is with us today; the Bio-Link Next Generation National ATE Center; and the Network's Resource Center in Phoenix.

CCTA Purpose

Michael Lesiecki - So the purpose of the CCTA is a simple one it responded originally to request from the Department of Labor how can we provide the services that have been developed over many years by the National Science Foundation to a broader audience specifically the Department of Labor TAACCCT grantees but it's more than that anything that's related to grants, NSF grants, workforce oriented programs that's the idea to get more information out there. What do we deliver webinars like this one and we identify and document best practices you'll see now many white papers on best practices posted on the website and we host convenings and we'll tell you more about those at the end of today's webinar.

Poll #1: Your Affiliation

Michael Lesiecki - Let's start with a poll, Christina let's go ahead and open the poll, friends you'll see it on the right-hand side over or the center of your screen where ever it is, take a moment and tell us a little bit about yourself are you involved with an NSF grant, both or neither and then once you've selected that button you have to hit submit in order for the information to be recorded so you probably know the answer to this one is pretty easy to click on one of those radio buttons and hit submit now I'm going to give you a countdown and then we're going to go ahead and close this poll and ask Christina to show the results five, four, three, two, one poll is closed. Just a moment friends you'll see the results come up on the screen there they are so it's interesting not in this particular poll we have some of us involved with the NSF, some involved with labor, some with both but the majority of the folks are not involved with either of those grants that's fine go ahead and close that Christina. We're all in favor of that because this topic about succession planning applies to a very broad audience, thank you Christina for closing that.

Poll #2: How many people are listening with you?

Michael Lesiecki - One more poll friends and then we'll get rolling here you know to expand our impact go ahead and launch, oh there it is Christina thank you, how many people are sitting there in the room just by yourself that would be none, you have a colleague that would be one, I remember sometimes we'll get in a conference room and get four or five people around the table and watch one of these webinars so that may be the case but we do track this information for NSF purposes go ahead Christina and start to close that poll five, four, three, two, one and let's take a look and then we'll get started for today, polls are a good way of us learning a little bit more about you and also demonstrating evidence of our dissemination like calculating how many people do attend the webinar beyond just those who are registered so thanks for responding to that so we're holding on for just a second and there's the poll so most of us are singles that makes sense and a couple of colleagues joining us go ahead and close Christina thanks very much folks for doing that.

Today's Presenters

Michael Lesiecki - Let me now turn to today's presenters the most important one I'm joking is the guy on the right that's me, Michael Lesiecki, I heard Phil laughing there, I was formerly at the Maricopa Community College's and now work on my independent business but let me first introduce Phil. Phil Centonze, he's the Director of Client Engagement at FloridaMakes, say hi to everyone Phil.

Phil Centonze - Good afternoon everybody this is Phil.

Michael Lesiecki - Phil welcome, I'm glad to have you here and Marilyn, Marilyn Barger she's the Executive Director and PI of the FLATE Center of Excellence in the Tampa area. Marilyn glad you and your colleagues survived the recent events down there.

Marilyn Barger - Thank you Mike and good afternoon everyone we're glad to have you all with us.

Michael Lesiecki – Excellent.

Poll #3

Michael Lesiecki - Before we get started one last poll I'm making them do a lot of work today Marilyn, Christina thank you for putting it up, so our topic today is succession planning put on your thinking caps when I think about succession planning: A) I turn to my existing plan that presupposes you have one; B) I realize that I should have a plan; C) I'm not sure what to do and D) I cringe. Remember please select your thing and then make sure you hit the submit button as well. Okay, you probably know the answer here I wonder how many of us are going to do D will probably be me go ahead and close the poll Christina in five, four, three, two, one it's just a minute for that cloud-based system to update and we'll take a look at the results. We'll get started today and the question is how many people cringe, Phil is laughing, okay takes just a moment for those results to turn over and then we'll get started and there they are okay not so bad that makes sense doesn't it Marilyn and Phil, I realize I should have a plan okay good go ahead and close Christina. Thanks a million friends.

What is Succession Planning?

Michael Lesiecki - That's important information for us because now I'm going to turn over to Phil. Phil, what is succession planning?

Phil Centonze - Well thank you Mike and again good afternoon to everyone, typically when we hear the phrase succession planning you know we think about having someone who's available to fill in an

important position when an opening is there what it's needed as you see well you can see the definition there from the internet but as you go to the as you see on the next slide.

What is Succession Planning?

Phil Centonze - You'll see that typically we think about succession planning for leaders and key managers in any organization and while that's important that's not where we stop, it really succession planning and approach the succession planning should really apply to all key skills because a gap in any key skill of function can result in a dip and performance of the organization and that's of course what we want to avoid as you see on the on the next slide.

Beyond Succession Planning

Phil Centonze - You know there really is a deeper meaning to the use of the phrase succession planning and that is to embed knowledge into the organization and into its processes and into its systems organizational knowledge is the sum of all individual knowledge but if that knowledge remains with the individuals it does as little good as far as an organization in terms of succession and sustainability of the organization and in realizing no disruptions in meeting our customer and our stakeholder needs. I would like to take a moment right now to ask Marilyn about what was the matter what's your view of succession?

My first thoughts...

Marilyn Barger – Well, you're going to see my view of success and planning or my first view of succession planning, when Phil brought this up to us. Phil serves as the external evaluator for our Center for FLATE and started that after we had been in business for a couple of years and we're really familiar with this term in the same manner that he was wanting us to think about so we just thought about oh so what does this have to do with what we're doing in our Center a grant project that we were all looking forward to engaging in across the state of Florida. So we did we thought about this in this way but on the next slide.

Untitled Slide

Marilyn Barger - We started doing some research and realized that this could be a complicated business and in the past it certainly has been and even in the present in our own government in the United States we have a lot of a very specific plan for our presidential succession going down as you can see those as far as I could show is the 17 the Secretary of Homeland Security in line for our top position as president so it's always been they find a lot of interest in organizations throughout the centuries actually on how to pass on power and make the organizations continue to perform although we don't think of necessarily might not balance kingdoms as that but that certainly was an organization and doing a little more research if you get interested they had quite sophisticated on the next slide.

Succession Planning

Marilyn Barger - You'll see those quite sophisticated different ways of succession in countries and tribes and different political organizations approach this idea for where how the top power in the country or the organization or the tribe actually passed from one to the other to the next person going along with that. So I think it turns out that we realized that I guess this was a new idea that we should also but something we should also be thinking of in our Center and for the more details on what it means and what it entails and includes I'm going to turn this back over to Phil.

Succession Planning

Phil Centonze - Thank You Marilyn. Well succession planning affects the entire you know the overall organization every part of the organization as we know an organization is a system of systems, a system of processes where every part is linked to every other part and affects every other part. On this particular slide you see a number of areas that you know where a succession planning has a role and has an impact you know in company mission which is basically the future orientation for base, basis for action of an organization knowledge management is really the approach to how do we retain knowledge within the organization so that this doesn't disappear with people as people come and go the workforce capability capacity looking to the future you know how do we plan for what it is that we need in the way of capabilities in our organization the capacity to meet customer and stakeholder needs. Individual learning and development you know our approach to helping people realize their full potential. Systematized processes and procedures you know processes in any organization should really have momentum they shouldn't standardize they should have the momentum to continue to keep the organization successful you know at adequate performance level into the future nearly independent of the you know various people that might come and go and operating those processes and sustainability or the endurance, organizational endurance you know to assure that the organization you know has ongoing high performance and continuously improves if you look on the next slide.

Typical Approach to Succession Planning for Key Skills

Phil Centonze - You'll see sort of a typical approach to succession planning for key skills yeah now it's not just leaders and managers, key managers that we're talking about we're talking about key skills throughout the organization you know of course the first step is to identify what those unique skills are what those key skills are that have a positive impact on the performance of the organization. Second is determined who or what you know where does the pool of people come from who potentially could fill those key skill positions that we have an organization now determining who these potential people could be doesn't necessarily guarantee them that they're going to move into that spot in fact in some cases they may not even have to know that they're part of that pool however when we get to step three here you know there has to be some sort of a plan for development of those people and some of those people actually might come from outside our organization but we still need that plan for understanding how we're going to train them how we're going to develop them so that if and when the time comes they can move into that key skill position and minimize the disruption in our organization on the next slide.

Succession and Sustainability in Industry

Phil Centonze - We're going to talk a little bit about the approach to succession and sustainability in industry and commercial businesses and typically commercial companies intend to endure over the long term. They want to be high-performing in the long term providing products and services of value to their customers and to their stakeholders on the other hand you'll see in the next slide.

Succession and Sustainability in Life-limited Organizations

Phil Centonze - You know we also need to address life-limited organizations and the you know life-limited organization has a known expiration date and that's typical of the NSF grants and the TAACCCT grants and other programs, special projects like that. And those you know the life-limited organization really needs to look at the critical and key functions that are related to the long term endurance of the organization, long term functionality I should say perhaps of the of the mission and the elements of the mission that are important. The intention of this life-limited organization is to be effective in the short term, but be able to transmit that success into the long term. While the short term need you know for sustained performance is important the primary purpose of a life limited organization is really in

developing those standard processes and systems and by integrating the knowledge of the people in the organization today, so that those processes and systems can be used in the future by others again looking at the long term in terms of organizational life or mission life on the next slide.

Application of Succession Planning in Industry

Phil Centonze - You know when we one of the approaches that industry uses in succession planning related to jobs and individuals is a formal mentoring program and I'm sure many of you have seen or heard of these you know where there's an experienced individual you know veteran in the organization takes a new person you know a new hire perhaps or just a new person into the area you know under their wing and basically you know teaches them the ropes there may be a formal qualification system with some sign-off so that it's a much more formalized development program and that you're transmitting knowledge in that way from person to person essentially. Another approach in industry is in the job and individual areas as you'll see on the next slide.

Application of Succession Planning in Industry

Phil Centonze - Is a very formal, very systematic tiered succession of skills and knowledge and I'll give you an example company that I've worked with has in fact that's the only the only company I've ever seen is this systematic and this formal. They've for each position there are three people there's the primary, there's the secondary backup and there's the tertiary backup and the way that they operate this the system is that the primary will work at that primary job for three and a half days a week let's say. The secondary backup will actually work at that job for a day a week every week and the tertiary will work at that job for half a day every week and that's formal, happens every week and the secondary and tertiary by the way have their own primary jobs as well and their backups for you know they have backups of their own of course but the important part about this approach is that things change in processes there may be some new technology, new information and by keeping the secondary and tertiary you know involved in the process on a weekly basis they are they stay fresh you know they don't get rusty and so when there's a need to fill in the disruption to the organization is minimal another approach on the next slide.

Application of Succession Planning in Industry

Phil Centonze - Is in process or function related succession and in this topic what I'm referring to is actual involvement of the people in the workforce involved, getting them involved and improving activity helping you know come up with it with some changes to processes so that their knowledge essentially is being transferred into the process and the processes get smarter of course they need to be documented you know the process and procedures the documents are there available and when and where needed by future employees in that in those positions. But it's taking information and transferring knowledge from current employees and embedding it into the organization essentially. Okay so let's look at life-limited on the on the next slide.

Application of Succession Planning in Life-Limited Organization

Phil Centonze - An approach that a life-limited organization might take in function related now this is peculiar to the life-limited organization it does require a long term perspective and it does require that standardization of processes and systems to assure you have that momentum. As I mentioned earlier you know going forward and staying high performing and being successful and effective in meeting customer and stakeholder needs. Now while I say here that this takes precedence over short term skills if by no means you know push a short-term skills succession to the side entirely to the side it's still important in the short term obviously but looking for functions and you know mission functions and

mission elements and keeping that sustainable over time keeping those sustainable over time you really have to look at this function related succession planning and if on the next slide.

Application of Succession Planning in Life-Limited Organization

Phil Centonze - You'll see they're kind of three phases to general succession planning is you know for the life-limited organization is first you need to identify what are those key functions, what are the critical things that we want to continue beyond the life of organization that have high impact on customers and stakeholders. Once we've done that then we can start to narrow down and identify what partners potentially could assume and assimilate those key functions going forward, they may have some funding that they can use or may fit into their mission as is, may fit in very easily and so on and then of course the third phase is actually planning for that transfer you know how it's going to happen and in transferring you know these functions, the key functions to a partner it's important that they those functions and the processes and systems behind those functions be standardized. As I was just mentioning in the previous slide, you know that's accomplished by using the personal knowledge of employees to develop a standardized processes so that their knowledge gets embedded in the process and then momentum of that process will aid the successor partner in accomplishing the function, on the next slide.

Application of Succession Planning in Life-Limited Organization

Phil Centonze - You'll see another approach for a life-limited organizations in succession planning this again has to do with job and individual related succession and this is very similar to the industry approach but again it's shorter term it you know it still might involve mentorship as I talked about or it might involve a system of you know primary, secondary, tertiary I described earlier. Now of course in a life-limited organization there might be some difficulty in attracting the individuals because it is a time limited opportunity for them however it you know while this is very important in the short term it does take a backseat as I mentioned to the long term function sustainability and outsourcing might be a partial solution for some of this as you go forward, on the next slide.

Application of Succession Planning in Life-Limited Organization

Phil Centonze - Another approach for a life-limited organization is not to do with process related succession and again it's similar to the industry approach you know bringing the knowledge of the workforce, bringing the knowledge of the employees into the process embedding it into the process focus here however should be on those processes that contribute to the long term critical functions which are what we determine our candidates for transfer to a partner, to partners and again outsourcing could be a partial solution although it's probably not going to be a very long-term solution for most of the critical functions .

Poll #4

Phil Centonze - So I would like to ask you at this point to think about how you would react if you lost a critical skilled person and had a gap in your organization. You should think about how your organization would respond if a key leader or manager or any key individual was suddenly to disappear. Would you continue to run smoothly meeting customer and stakeholder needs; would you experience some decline in performance but be able to recover; would you experience major disruptions and have to really scramble for recovery or you know would you be so severely impacted that you really couldn't sustain performance. So if you don't mind go ahead and click your response for this poll and we'll see how it turns out.

Michael Lesiecki - Phil let's give people a minute here because this is a little more complicated question although I see a whole bunch of people have already started to answer so let's see what it is. I'm interested in the results of this one because I've got an idea here, Phil. Let's count down and Christina can close this five, four, three, two, one let's go ahead and take a look, remember folks on these polls might be too late to tell you don't forget to hit submit. We'll take just a minute four go up in the cloud to calculate the numbers and send them back to us, so just one second Phil and we'll see what people have had to say, okay so the cloud is doing its thing. Oh that doesn't surprise me does it right number C, experience major disruptions and operations and have to scramble a recover.

Phil Centonze - Mm-hmm yeah that's interesting okay that makes sense with the earlier response that we realize we need a plan.

Michael Lesiecki - Go ahead and close that Christina thank you. Go ahead Phil.

Questions?

Phil Centonze - Thank you. Well at this point actually I do want to ask are there any questions that I can answer, or Marilyn and I can answer about succession, anything we've talked about to this point.

Michael Lesiecki - You know Phil we've had several that have come in and let me bring those up right now and let me remind folks just to use your Q&A window for the questions. Here's the first one realistically should I set aside funds in some way for succession planning part two of the question is that an allowable grant cost I mean you mentioned it during your presentation Phil but how does say a grant funded organization, do you fund this or do you just do it you know what I mean?

Phil Centonze - Well it's you know obviously the funding will not extend beyond the expiration date of a grant of an NSF grant so you cannot fund the partners as far as I know.

Michael Lesiecki – They meant funding the planning process itself not the activities I got that.

Phil Centonze - Oh okay well yeah in that case I see that it's part of what should be the daily routine or the weekly or monthly routine of managing the organization you know there's got to be some planning whether you use the logic model to understand processes in fact that's probably a good way to take a look at your organization look at the process model I'm sorry the logic model and I use something called the site pock which essentially is a logic model with the supplier packed on the front end of that model but essentially that will tell you know if it's been developed adequately you know what your key functions are and that really should be part of your as I said your daily routine or weekly routine of managing the organization, managing the grant ensuring that you've got the right strategies in place and part of that strategy is to ensure you've got the short-term succession in place and looking towards the long term, I don't know Marilyn.

Michael Lesiecki – Makes sense.

Phil Centonze - Marilyn would you like to add anything to that.

Marilyn Barger - Well as I mentioned earlier was full discloser that Phil is our external evaluator for our Center this is was the next view of succession planning that he brought to the table after we first engaged with work together and I got over the shock of having to not name the next queen or the next king of our grant program and that wasn't a sufficient answer to the question of how does this progress

and I think we spent a lot of time talking through what we were doing as an organization and not necessarily so focused as we grew over the years but trying to identify those things that we needed to sustain so as soon as we could translate it to sustainability we had a little bit more comfortable conversation about the concept of what we should be planning for and it also melded well with our whole evaluation plan so we're going to talk about that next a little bit more in detail so I'll stop in case there's some other questions.

Michael Lesiecki - We do have one more Marilyn and I'll start with you on this one and this came in through our window it says you know small organizations are in fact small organizations and it's people and emotions involved and I think I see what they mean by this question I mean you start talking with your group about succession planning and then they start immediately saying well my job you know they start thinking along those lines what about an emotional side how do you deal with it maybe just by being utterly open and describing what's going on but have you seen that play in smaller organizations the emotional side of it.

Marilyn Barger - Most certainly in grant's organization like the NSF ATE projects and the centers who were engaged in many of those projects that I've worked with over the years at both levels are very tied to each other and very passionate about the work that they're doing together and also the impact that are having on students so that's a very kind of close-knit family almost organization and the ending of the external funding is you know what do we do extra what parts that we really institutionalize them need to be addressed I think openly and discussed as a team certainly those who are not in a full-time permanent position in the institution know that they're hired just for the grant project that it's a temporary position no matter how long it might end up going on and in the case of the center which could be just ten years but in the case of a project might only be two or three. But I think that conversation has to be open or people need to be reminded that, that's the situation that they're in the good news I think in many cases of those same people that get engaged in projects often become part of the institution in some capacity similar to the work that they do in the project or in the center which is kind of a good transition place for them so I think it may turn out to be more of a reminder for some people that this is a temporary organization and that our job is to push this, try to find a place for you know for all of us together to find places if there needs to be if they're not permanent folks if they want to stay in education environment in our case.

Michael Lesiecki - Yeah okay that's a good approach and I know that concerns all of us right how do we deal with the people involved and you both of you Phil and Marilyn alluded it to you in your private and you excuse me in your previous section let's go ahead we'll save got a couple of the questions which will save for our next break.

FLATE's Vision

Michael Lesiecki - Marilyn would you tell us a bit more about the specific situation with your own organization a life-limited organization?

Marilyn Barger – Okay thanks Mike and thanks Phil for the great introduction he did that so nicely in a few minutes and it must have taken him four or five years to meet some of those concepts into my head and into our organizations but thanks for persisting in that. So FLATE is a NSF ATE Regional Center we're focused on advanced manufacturing and typically work or primarily work in the state of Florida and we came into existence wanting to be the kind of go-to place for manufacturing and production industry education and training and knowing what their skills were and making sure they had an adequately trained workforce so on the next slide.

Strategies for Impact & Sustainability

Marilyn Barger - Just to let everyone know what the advanced technological education mission is its we dovetail right under their mission as a center we in order to have the best technical programs for the manufacturers in Florida we stand on this kind of three-legged stool we do outreach and recruitment to get more students interested in manufacturing that is still a challenge even though manufacturing has become much more trendy and much more in the public eye still challenging to get young people interested in this as career path and we do professional development for the educators and involve both at the high school and the college level to make sure that we have the best instruction, the most current technologies and the most current educational technologies for delivering those programs of study, so the students again are ready to go to work with the best tools we can find for them and then of course there's the content based information which is the curriculum and making sure that it's aligned to industry needs and that the again that the students are ready to go to work when they complete the programs is really important. So keeping industry engaged is definitely an important piece of curriculum it's also important for the other aspects our outreach and professional development work. So those three kind of legs we say help us focus on the work that we do and we try to package our work into one of those three areas that helps us with our process thinking that Mike alluded to or Phil alluded to sorry about that in his slides before that, so can you go to the next slide Mike.

Strategies for Impact & Sustainability

Marilyn Barger - Even before Phil became our external evaluator we were engaged in the kind of quality organizational process we adopted a Malcolm Baldrige approach to our external evaluation which meant that we were also not only engaged in what we told our funders and National Science Foundation that we would do but we were also interested in developing an organization that followed the same kind of processes as the industry that we wanted to work with followed and that took us to the quality arena where we got engaged with the Malcom Baldrige kind of process and looked at our work at these three kind of levels. So in one piece that a lot of people don't get to, but in order to think about sustainability and succession planning you have to think at this organizational level so focusing on that on the next slide.

Strategies for Impact & Sustainability

Marilyn Barger - You'll see that we really funnel all of our work at the activity level which means some of the interactions we do the curriculum we develop, workshops we do for educators, recruitment efforts and activities all talked to what how we are as an organization or what we do as an organization and how we process that. So again this is to become a more try to be more endurance focused organization so we can think of start thinking about sustainability of the individual pieces underneath our within our organization, so on the next slide.

Strategies for Impact & Sustainability

Marilyn Barger - We'll start talking about some of the characteristics of our organization of our Center at a different level not what we do but what we look like. We have a small obviously temporary staff since we're then grant funded, we have a lot of partners and collaborators and stakeholders and one of the things we did learn from Phil, was to really utilize our stakeholders and our volunteer partners. We do have a finite life as a life-limited organization, we have finite resources and we did want to maintain high productivity even when we lost a staff person and so how are we going to do that and of course having temporary staff that happens frequently during our tenure and how can we institutionalize our projects and activities so this relates directly back to Phil's conversation about process focused and capturing in the manufacturing industry what they would say is tribal kind of knowledge, how do we get the

knowledge of those people and maintain it in the organization. So continuing with this idea of what can we do or what are some of the activities that we engaged in on the next slide.

Strategies for Impact & Sustainability

Marilyn Barger - We'll continue with this conversation we have two kind of ideas that we bucket this work into. One is we wanted to make sure we could maintain our work and our workforce and then secondly we did begin to identify projects and activities that we found have high stakeholder value or impact and started looking for ways to sustain those activities. We didn't really know where to start that particular job but we'll come back and talk about that in just a minute, but to maintain our workforce it was kind of some standard things, but we did think about it, talk about it and also develop some strategies and some practices within our group. So we developed a lot of shared resources and by that I meant we all developed templates that for our work, we develop you know common graphics, email templates some of those things that we all use and house them in the same places so that when they went out from the organization from anyone in our team that we used the same vocabulary with our stakeholders we did a lot of cross-training of our small staff and some of that was done by some of the bullets below here where we developed or assigned teams and assign different people different team members to be the lead of those activities or those particular projects and then a secondary person to work with them or sometimes a third depending on the size of the project that was going on, so that those duties rotated but they engaged not only the leader but also one or sometimes two additional people. So they would learn how that particular activity was run and also we managed to capture the process for those how did we do it, what needed to be done, we develop checklists again more specific templates that went with the activity, standard survey, standard instruments to use during those activities as well. We did a lot of communication became really more and more important and did that at a regular staff meeting where we all shared the work we were doing individually and as different kind of sub teams on different projects and we developed individual kind of position manuals for each of the jobs or job functions each of the positions that were part of our Center including our student workers who are of course in any educational institution are the most transient so we go through those, well one every year or something like that, a lot of turnover but we found that providing them with a manual that the previous student maintains with some oversight of course was a really useful tool so they would could you know they could refer to it on and not feel like they were always looked down upon for asking questions and continue to work at a good pace and get their work done. So in the area of identifying for the focus on so that kept us as going and maintaining a high I would say a high level of productivity during our tenure and at the same time identifying this second bullet, trying to identify the activities that have high value and high impact, we ultimately developed a tool that you can see on this on the next slide

Untitled Slide

Marilyn Barger - So this is a very small picture of a multi-page document but I'll give you the Cliff's Notes of this. This tool this evolved over a couple of years as a working tool for us that we reviewed on a regular basis maybe every six months or so we would update this tool and what you can't ,you might not be able to read the columns across the top, I'll get to those in a minute but the first column is just what is the program or the activity and you'll see those three legs that we areas of work that we engage in the ATE community typically I'm always sorry to leave out the folks who do technician education research but we didn't do that particularly at our Center so there're just these three and we so we divided our activities into these put them into these buckets and then across the top we said ok so we have an award system for educators, called the FLATE Awards that's the first row here under outreach and that the goal of that was to you know bring some recognition to the manufacturing educators in our state that we're doing great things and working with industry. We identified some partners that we had

worked with on that kind of project the annual project and what their role was and those roles evolved through time. There's this progress column to say we've making progress towards moving this project to a partners responsibility or to the partner organization and then just a column for notes which we call post-it's since we had a bunch of P's across the top we labeled that one just a note column as post-its. So for example we decided that the awards was a great way to recognize people and educators and that it would be really good if this continued we approached some organizations in the state that seemed appropriate and actually identified one that would I use the word adopt this project and we're transitioning the awards to them they'll still maintain the FLATE Educator Manufacturing Educator awards title we post base now hosts the awards ceremony and run the selection process and this next year the last phase of our transition is to transition the sponsors of those of the awards from our Center to this other organization it's a professional organization for educators that's the Florida Career and Technical Education Association a division or subset of ACTE National Organization, so that's kind of been a two and a half year process of transitioning we allowed or started that early on realizing that we thought this particular activity had high stakeholder value in our community and something we wanted to maintain but I'd like to point out that when we made this list there are some items that we knew would only be sustainable if somebody jumped and said I'll support that and here's X number of dollars per year. So for example our website is not hosted on our College web platform but independently and without very specific financial resources that somebody would pick up that will disappear so going out and looking just for funds for that we felt had lower priority than some of the other things we were doing and that's kind of left in the you know in the wings at this point in time we haven't really addressed that. So we did some prioritizing and continue to look for opportunities for you know finding places for these activities that we thought had high value for our stakeholders or if others were already institutionalized like some of the curriculum that we developed and put in place across the state we acknowledge that in this chart and who the holder of that curriculum was or what institutions it was being delivered at we have a statewide system so some of that is at the Department of Education and that kind of thing so we just we included it in our table so we could feel good that this was done and in good hands and then you know moved on to some of the other more challenging opportunities that we you know were trying to make sure some of the activities we had actually continued. So I won't go into any more detail we have this kind of framework of a tool if anyone's interested in more details than that we found it really quite useful we have an annual review with our national visiting committee and we would certainly spend some time with them on this and look at it with some they would help us do some of the prioritizing and they didn't come up with any money unfortunately but they helped us put some of the activities that we did and we're engaged in the work that we were doing in perspective from their point of view which helped us to kind of prioritize what how we approach the I think there's probably about 10 pages altogether in this document so a number of activities. So I'm going to ask Phil to summarize and then we'll get back to some more questions.

Summary of Key Points

Phil Centonze - Thank You Marilyn and one thing about the tool that FLATE uses you know it may be obvious that 10 pages worth of functions of you know key programs may not all get extended into the long term they may not be a partner for all of them so they really have to be prioritized as Marilyn said and you know work on the ones that are the higher priorities. So anyway in closing I hope that we leave you with the view you know that it is necessary to consider succession and short term effectiveness to meet the customer and stakeholder needs and to stay high-performing. It's also important regardless of the type of organization and as you saw hopefully that it is a little different approach at each you know the long-life organization versus the life-limited it is important in to embed that workforce knowledge into systems and processes so that you can enhance the organizational endurance in the long term and

for the life-limited organization be able to use those smarter processes and standardized processes to transfer to a potential partner. Thank you, are there any questions at this point.

Michael Lesiecki - There are some comments Phil you know what struck I'll make a comment if I can what really struck me is your last bullet here that thinking about succession planning and sustainability it really is a different, in my mind it never quite framed it in that in the terms of the length or the time horizon so that really make it a made an important point to me so thank you for that.

Phil Centonze - Thank you.

Michael Lesiecki - Marilyn I have a question for you and it came in I'll start with you and I might turn to Phil as well but when you sit down with an employee this is what the question says and talk about succession planning to discuss professional development at the same time that is do you say if you could develop yourself you could move up maybe that's setting expectations or have you ever had to handle that combining professional development and succession planning discussions, tough question.

Marilyn Barger - Yeah that's a tough question, I'm very lucky with our Center and we haven't had that many people with my current team and have one employee who's been with us over ten years and another over seven and they both are in newer positions than they were in when they started and it was more it was actually that they came to me when another slot was open and asked if I thought they were qualified to move up and so having had long-term people in those temporary positions is kind of amazing but also gave me more food for thought because I always thought of them in the position they were in and hadn't really thought about potential and it turned out that both of those moves although we go through the regular college posting and hiring were great opportunity so I would say that I got the professional development in those cases of you know thinking about it in that way I was reliant on those folks to be there and I didn't really cross my mind until they brought it up in two separate cases that they would did I think they had the potential to be in those positions and they've both done really great in their new positions and I was more than excited to be able to pay them which is a challenge in the education environment. So I think for me it happened to be the reverse but I don't know anyway that's all I can say about my experience there.

Michael Lesiecki - Phil what about you from your side you bring the industry perspective here do industries formally talk about professional development in the same breadth of succession planning or they setting up something an expectation for the employee and they worry about that do you know what I mean?

Phil Centonze - Yes usually it is part of that discussion part of the same discussion because you know typically what I see is the manufacturer or any other organization for that matter it doesn't have to be just manufacturing but any other commercial business will you know have a discussion with the individual and it'll be a combined discussion, it'll be a combined performance you know evaluation so to speak you know for the last year let's say and a goal setting for the next year and at the same time and then when you're talking about goals going forward then it also becomes you know incumbent to talk about what sort of development does the individual need going forward to help to be better at achieving those goals or in whether they're company goals solely or if it's a combination of an individual's goal and a company goal which is best you know if they both have a share ownership in the goal but yeah it does the succession planning is usually you know incorporated at that point in the discussion.

Michael Lesiecki - Okay makes sense for we're perfectly on time today and for a final wrapping up question you know many of us in the proposal world are getting ready for submissions this fall and in some cases the solicitation calls for discussion of sustainability but it almost never uses the succession planning word I would guess it's too soon to put succession planning into a proposal do you think that's true Marilyn you just probably talked about sustainability right in that section?

Marilyn Barger - Yes I do I have not ventured into that vocabulary I think sustainability is challenging enough for many grants and I just made a kind of direct translation to succession planning for us and going forward with the work that we did I was much more comfortable talking about it as sustainability then as succession planning but I see the kind of unique aspect of succession planning really involved with people as well as the kind of products that we have. So I think a good plan for sustainability and I know it's at the front side you don't have anything so it's hard to think about sustainability but if you can think about it up front that you know this is going to be a great project and a great activity because we all think that at the beginning of a project that gets funded that we should also be thinking of really realistically thinking about it instead of doing this kind of face time to it really thinking about what will really happen, will the college really adopt this and if they do you know how are they going to be able to afford it, I think we talk at it but we don't really talk about it and then at the end you know we get we're already passionately connected so good activities that we get fretful about what's going to happen to them and that they'll be lost and gone and we can avoid that by including it at the beginning of the conversation about you know what will happen in three years or what will happen in four years whatever.

Michael Lesiecki - Good point well just I'll throw in my own editorializing here I remember talking with several groups about this concept of both sustainability and succession planning and their answer was we'll get another grant and I think today's information is that it's quite a different story than man so you know we're all sort of smiling at that. Let me take us forward here into our.

Questions

Michael Lesiecki - Oh thank you Marilyn that's a lovely Wordle there with lots of cool things on it, I should have had that up so we admire that. Now let's go forward.

Contacts

Michael Lesiecki - Folks our two presenters are actually very interested and passionate as you heard about talking about this topic you can contact Marilyn at her email there or Phil at his email as well and please remember www.atecenters.org/CCTA is the website for this webinar series and other information.

Join Us – All Webinars 3 pm Eastern

Michael Lesiecki - Our next webinar is occurring on October 19th and it's all about career exploration well that's a big thing today for students you know pathways career exploration big deal our presenter Elaine Johnson, PI from Bio-Link and her colleague Sandra Porter are both very knowledgeable about this topic so please join us go to the website register.

Join us in National Harbor!

Michael Lesiecki -And join us in National Harbor at the Innovations Conference brought to you by the League for Innovation in March in Maryland. CCTA will have a workshop there a whole afternoon and we look forward to discussing topics that are relevant to you, that's the idea.

Join us in Miami!

Michael Lesiecki - And finally next summer not too far away well I guess it is sort of faraway, Miami for the High Impact Technology Exchange Conference.

Register for HI-TEC and DOL and NSF Workforce Convening

Michael Lesiecki - And those dates are July 25 through 28 some pre-conference activities and a post conference activity in the planning stages for Friday July 29, so mark it on your calendar get out your rollerblades get them ready for doing some rollerblading on the Miami Beach boardwalk, next slide.

Webinar Survey

Michael Lesiecki - As we leave today you can't avoid it you shut down the system and up pops a webinar survey in a different window, if you take just a moment there's only four questions to respond to that it will help us become better, so thank you for doing it. No action required on my part it happens automatically. Phil thanks very much for all of your insights today as Marilyn said that you could see how much experience there was behind your comments and the way you organize those things so thanks very much for doing that.

Phil Centonze – Thank you Mike.

Phil, do you think those apply to both, large and small organizations or maybe leaning towards one or the other?

Phil Centonze - To both and the approach though what is actually done would be different you know that example I talked about the primary, secondary, tertiary was a larger organization. A smaller organization doesn't have the resources to do that level of succession planning but it still applies to both.

Michael Lesiecki - Right thank you. Marilyn I think what was important to us today was to hearing your direct experience right this wasn't theoretical stuff, but was your direct experience and how you approached it and some of the challenges involved so thank you very much for telling us about that.

Marilyn Barger - Thanks Mike and thanks everyone for attending.

Michael Lesiecki - Good that concludes our webinar we're right at the top of the hour. Friends thanks for joining, CCTA forever, join our future webinar series. Phil and Marilyn thanks very much, always fun talking with you.

Phil Centonze - Thank you.

Michael Lesiecki – Christina let's go ahead and shut down the system your webinar surveys will pop up.