



ATECENTERS

Preparing for the Future: Succession Planning and Related Initiatives

September 21, 2017

Webinar will begin at 3pm ET



Webinar Details

- For this webinar you will be in listen only mode using your computer or phone
- Please ask questions via the question window
- This webinar is being recorded – you will be sent a recording link

Brought To You By:

CCTA | CENTERS COLLABORATIVE FOR TECHNICAL ASSISTANCE

With Additional Support by the ATE Collaborative Impact Project

ATECENTERS

Disclaimer: This material is based upon work supported by the National Science Foundation under Grants # 1205077 and # 1261893. Any opinions, findings and conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the National Science Foundation.

The CCTA IS Led By



NETWORKS

- **National Center for Convergence Technology (CTC)** at Collin College in Frisco, TX (lead)
- **South Carolina ATE National Resource Center (SCATE)** at Florence Darlington Technical College in Florence, SC
- **Florida ATE Center (FLATE)** at Hillsborough Community College in Tampa, FL
- **Bio-Link Next Generation National ATE Center for Biotechnology and Life Sciences (Bio-Link)** at City College of San Francisco in San Francisco, CA
- **Networks Resource Center** at the Maricopa Community College District in Phoenix, AZ

CCTA Purpose

- Respond to a request from the Department of Labor (DOL) to the NSF to have ATE Centers provide technical assistance services to DOL TAACCCT grantees
- Activities relevant for DOL grants, NSF grants and workforce-oriented programs of all kinds
- Deliverables
 - Topical webinars on existing and new solutions
 - Live/recorded with attendee Q&A
 - Identify and document best practices
 - Host convenings

Poll #1: Your Affiliation

- A. I am involved with an NSF grant
- B. I am involved with a TAACCCT grant
- C. Both
- D. Neither

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

- A. None
- B. 1
- C. 2
- D. 3 or more

TODAY'S PRESENTERS



Phil Centonze

Director of Client Engagement
FloridaMakes



Marilyn Barger

Executive Director &
PI, FLATE Center of
Excellence



Michael Leseicki

Principal Luka Partners LLC
Moderator

Poll #3?

When I think about succession planning:

- A. I turn to my existing plan
- B. I realize I should have a plan
- C. I am not sure what to do
- D. I cringe

What is Succession Planning?

Defined by www.businessdictionary.com as the: Identification and development of potential successors for key positions in an organization, through a systematic evaluation process and training.

suc·ces·sion

sək'seʃHən/ (noun)

What is Succession Planning?

Typically:

- related to replacement of leaders and key managers
- goes beyond a typical narrow approach in true planning for future success

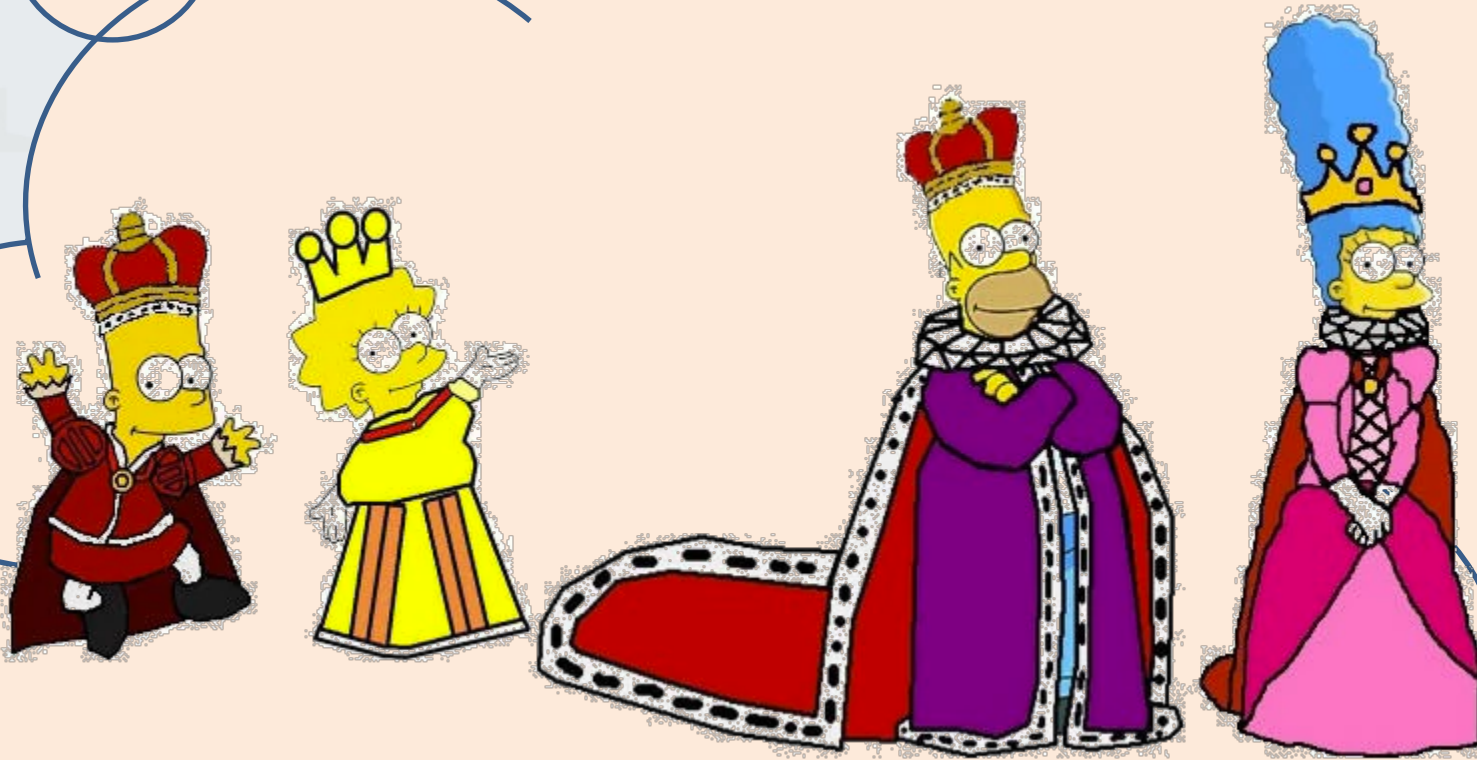


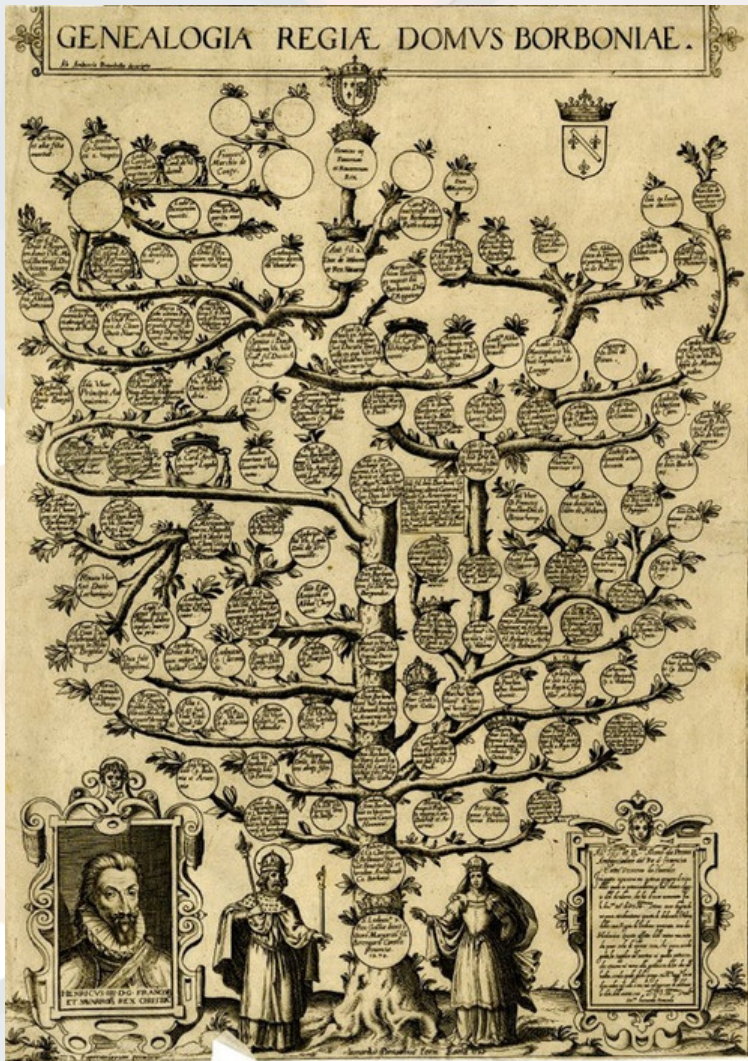
Beyond Succession Planning

The deeper intent of **Succession Planning**:

- Embedding knowledge in an organization's structure and functions
- Assure continuous sustainment of performance
- Meeting customer and stakeholder needs
- For organizational endurance

My first thoughts...





No.	Office
1	Vice President
2	Speaker of the House of Representatives
3	President pro tempore of the Senate
4	Secretary of State
5	Secretary of the Treasury
6	Secretary of Defense
7	Attorney General
8	Secretary of the Interior
9	Secretary of Agriculture
10	Secretary of Commerce
11	Secretary of Labor
12	Secretary of Health and Human Services
13	Secretary of Housing and Urban Development
-	Secretary of Transportation
14	Secretary of Energy
15	Secretary of Education
16	Secretary of Veterans Affairs
17	Secretary of Homeland Security

Succession Planning

- Overview
- 2 Monarchies and nobility
 - 2.1 Primogeniture
 - 2.2 Agnatic succession
 - 2.3 Salic law
 - 2.4 Rota system
 - 2.5 Appointment, election, tanistry, and rotation
 - 2.6 Seniority
 - 2.7 Partible inheritance
 - 2.8 Proximity of blood
 - 2.9 Ultimogeniture
 - 2.10 Lateral succession
 - 2.11 Matrilinear succession
 - 2.12 Succession crises

Succession Planning

An element of organizational endurance and has key linkages other parts of an organization:

Company Mission

Individual Learning & Development

Knowledge Management

Systematized Processes & Procedures

Workforce Capability & Capacity

Sustainability

Typical Approach to Succession Planning for Key Skills

1

Identify high skill and/or unique skills that have positive impact on performance

2

Determine individuals who could potentially fill those key positions

3

Make a plan for development and training of selected individuals

Succession and Sustainability in Industry

Typical companies have goals that:

- It will endure (is sustainable in the long-term)
- Is high-performing
- Is successful in meeting customer and stakeholder needs

Succession and Sustainability in Life-limited Organizations

Special Circumstance:

- A Grant program or special project is typically life-limited with a known expiration date
- Must look at sustainability and endurance differently

Goals of a typical life-limited enterprise are to ensure the organization:

- Is high-performing and successful in meeting customer and stakeholder needs in the short-term
- Can sustain and make its critical mission functions endurable in the long-term

Application of Succession Planning in Industry

Job- and Individual-related...

- Formal mentoring program
- Experienced individuals assigned to a new person
- Formal qualification system and sign-offs



Application of Succession Planning in **Industry**

Job- and **Individual-**related...

- Tiered, very systematic succession of skills and knowledge
- Employees assigned as back-ups, regular training and exercise of skills, and updating of knowledge
- Minimizes disruption in performance



Application of Succession Planning in Industry

Process- or Function-related...

- Involvement of employees in improvement activity
- Improvement is a result of building employee knowledge into processes, making processes “smarter”
- Documenting improved processes and procedures so they are available when and where needed

Application of Succession Planning in Life-Limited Organization

Function-related...

- Peculiar to life-limited organizations
- Requires a long-term perspective
- Requires standardization of processes and systems to assure momentum going forward
- Takes precedence over short-term key skills succession

Application of Succession Planning in Life-Limited Organization

1 Identify key functions that have high impact on customers and stakeholders.

2 Identify partners with potential for assimilating key functions.

3 Plan for transferring responsibility and “ownership” of key functions,

Application of Succession Planning in **Life-Limited** Organization

Job- and Individual-related...

- Similar to Industry approach but shorter-term
- Some difficulty encountered in attracting individuals for a time-limited opportunity
- Still important, although this takes a back seat to long-term function sustainability.
- Out-sourcing could be a partial solution

Application of Succession Planning in Life-Limited Organization

Process-related...

- Similar to Industry approach
- Focus should be on long-term critical functions, as candidates for transfer to partner(s)
- Out-sourcing could be a partial solution, although probably not for critical functions

Poll #4?

If any key leader, manager, or skilled individual were to suddenly disappear, my organization would:

- A. Continue to run smoothly, meeting customer and stakeholder needs.
- B. Experience some down blips in performance, but be able to recover quickly.
- C. Experience major disruptions in operations and have to scramble to recover.
- D. Would be severely impacted and could not sustain or improve performance.

The background is a collage of circular icons in various colors (blue, green, orange, grey) representing different fields: a robotic arm, a lightbulb, a gear, a globe, a flask with a plant, a bar chart, a molecular structure, and a padlock.

Questions?



a *Life-Limited* Organization

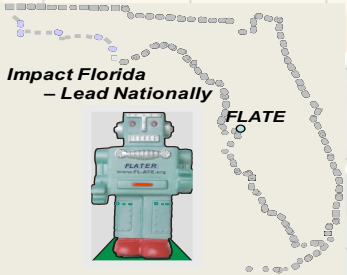
FLATE's Vision

FLATE, an NSF-ATE Regional Center of Excellence for Advanced Technological Education, is the go-to organization for manufacturing and advanced technical education, best practices, and resources supporting the high performance skilled workforce for Florida's manufacturing sectors.



Strategies for Impact & Sustainability

N O A T E
 S U V
 F L A T E
 R L F
 P R O F E S S I O N A L
 A P A
 C U R R I C U L U M T
 H E E
 N
 N S F - A T E



Strategies for Impact & Sustainability

**Organizational
Effectiveness**



Center Goals



**Target Objectives
Effectiveness Measures
Guiding Principles**

Strategies for Impact & Sustainability

**Organizational
Effectiveness**



**Organization
Level**

**Program
Level**

**Activity
Level**

Strategies for Impact & Sustainability

- Small, temporary staff
- Many partners, collaborators, stakeholders
- Finite “life”
- Finite resources
- How we maintain high productivity when we lose a staff person?
- How do we institutionalize our projects/activities?



Two strategies for Impact & Sustainability

- Maintain workforce
 - Developed shared resources
 - Cross trained all staff
 - Developed position “manuals”
 - Weekly staff meetings for sharing
 - Appoint “lead” and “team” for each project/activity
 - Understand the value of our volunteer workforce
- I.D. projects/activities that have **high stakeholder value/ impact** and find a way to sustain them

PROFESSIONAL DEVELOPMENT

PROGRAM	Partner/s	Partner Role	Progress	Post-Its
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CURRICULUM

PROGRAM	Partner/s	Partner Role	Progress	Post-Its
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OUTREACH

PROGRAM	Partner/s	Partner Role	Progress	Post-Its
FLATE Awards	FACTE, FAITE & sponsors. Florida Association of Career and Technical Education (FACTE) and Florida Association for Industrial and Trade Education (FAITE)	FAITE, a division of FACTE, will take over and “host” the FLATE awards – keeping the FLATE name.	Initial phase of move to FACTE is complete. FLATE awards to be given at 2016 FACTE annual conference. There were no 2015 FLATE Awards since FACTE is 1/2 year off cycle.	FAITE will be the new host of award process. FLATE is working closely with FACTE/FAITE this year to transition the 2016 awards. FLATE recruited sponsors; FACTE has added FLATE to its awards pack; both will recruit nominees and judge. Final transition in 2017.
“Made in Florida” website resources for manufacturing education	None at this time. Possibly parts will be maintained by FAITE or FloridaMakes. Important documents archived on ATE Central.	Website to host and maintain all/some of resources.	Initial conversations about some content being maintained by FAITE/FACTE and FloridaMakes.	Nothing confirmed to date. Requires resources.
“Made in Florida” DVD/Video	Possibly FloridaMakes	Maintaining current posting of 2015 Video on YouTube and a Florida website as well as maintain master video.		Plans currently include distribution of the MIF DVD copies until current stock is gone. Video will be archived on ATE Central.
FLATE Summer Robotics Camps @ HCC	HCC Continuing Education and Brandon Campus	Host camps and take over the ownership of the robot hardware. Take over organizing and incorporating with their own summer camp programs.	Engage conversations after summer 2015. Transfer ownership by 2017.	FLATE Robotics camps at HCC have been very successful and popular. Transition to HCC summer programs will have issues as they need to make a profit (we operate camps close to cost). Cost will go up; integrity down. 2015 published camp curriculum will help.
FLATE Summer Robotics Camps @ other locations	Many colleges, schools, and community organizations.	Host and run camps using FLATE curriculum and its surveying tools. Maintain equipment.	Publishing standard camp curriculum for intro and intermediate levels. Update Camp Guide in 2016 and archive revisions.	Continue to support existing camps with curriculum, processes and student and parent surveys. Camps should continue un-interrupted. Will lose statewide data comparisons.



Summary of Key Points

- Important to consider short-term needs and long-term endurance of an organization
- Need to consider retaining and embedding employee knowledge and skills into the organization and its process and functions
- Approach to succession planning and sustainability differs, depending on the time horizon of the organization

Contacts

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<http://www.atecenters.org/ccta>

Join Us – All Webinars 3 pm Eastern

Thursday, October 19, 2017

Career Exploration

In this age of emerging technologies, many students and their parents have not been exposed to the great variety of careers open to them. Career exploration is taking on an increasingly important role in community college programs. This webinar provides examples of career exploration tools that are available to students, teachers, faculty members, counselors and others who are interested in assisting students make wise career choices.

Presenters:

Elaine Johnson

PI and Executive Director, Bio-Link

Sandra Porter

President/Founder, Digital World Biology, LLC

For Other Upcoming Webinars See: <http://www.atecenters.org/ccta>

Join us in National Harbor!

Innovations Conference March 18-21, 2018 in
National Harbor, MD.

CCTA workshop to be held during the conference!

Join us in Miami!



July 25-28, 2018



www.highimpact-tec.org

Register for HI-TEC and DOL and NSF Workforce Convening

HI-TEC Conference July 27-28 in Miami, FL

www.highimpact-tec.org

Free follow-up **DOL and NSF Workforce convening** for all TAACCCT grantees, NSF grantees and others who can benefit on **Friday, July 29.**

WEBINAR SURVEY

Please take a moment to help us become better...