

# I Won! Succession Planning for Winning the Lottery



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2024 Institute for Chief Academic Officers and Their Teams // November 1–4, 2024  
Hilton Portland Downtown // Portland, Oregon

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# Presenters

**Maureen Forrester Finney**, Provost, Nazareth University (NY)

**Adrienne McCormick**, Provost and Vice President for Academic Affairs,  
University of Redlands (CA)

**Jamie G. McMinn**, Vice President for Academic Affairs and Dean of the College,  
Westminster College (PA)

# Chair

**Shawn M. Hartman**, Senior Vice President, Academic Search

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# Views from the Field

- **In general, higher education does not plan well for regular transitions, let alone short notice transitions.**
- **We just never know when or what will come up in life.**
- **By being proactive, we can care for our teams and their wellbeing.**



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# Prioritizing Documentation for Knowledge Transfer and Retention

## Position description vs. Position posting

- **Performance Management**
- **Gap Analysis and individualized professional development plans**



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# Additional Challenges of Succession Planning

- **Institutional Mission and Culture**
- **Diversification and Internal/Peer Networks**
- **Limits of Confidentiality and the Successor Pool**
- **Psychological Correlates of Succession**



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# Strategic Hiring and Role Specialization

- **Assistant and Associate Vice President roles**
  - **Appointment letters, job descriptions, and other duties as assigned**
- **Strategy vs. Culture**
- **Successful feedback loops**



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# Resources for Effective Succession Planning

- <https://hr.uw.edu/pod/wp-content/uploads/sites/10/2018/08/Succession-Planning-Toolkit.pdf>
- <https://www.csu.edu/humanresources/empdev/workforceSucessPlanning.htm>
- <https://hr.berkeley.edu/grow/grow-your-impact/services-offered/succession-planning-academic-and-administrative-departments>
- <https://www.csun.edu/leadership-principles/succession-planning>
- [https://sc.edu/about/offices\\_and\\_divisions/human\\_resources/talent\\_management/succession\\_planning/index.php](https://sc.edu/about/offices_and_divisions/human_resources/talent_management/succession_planning/index.php)



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# Table Top Discussion Leads



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**Provost K has been with her university for three years and has just learned that the dean of nursing is resigning to become a healthcare consultant. The dean joined the university 15 years ago as a faculty member, and he has chaired several important governance committees. Provost K has been asked by the university President to recommend whether they should begin a national search or appoint a current faculty member to the dean position. If you were Provost K, what recommendation would you make, and what factors would influence your decision?**



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**Your Turn College is a small liberal arts institution, with the faculty organized by departments led by chairs; the chairs report to a VPAA. Faculty members within a department rotate through the chair role, with most chairs serving for five years. The philosophy of this rotation system is that it creates collegiality within departments and gives everyone an opportunity to lead. Professor T is next in line to chair the history department based on her seniority, but she wants to take a sabbatical to make progress on a book that is under contract. Professor T has a meeting with the VPAA to discuss his request for her to chair the department. What advice would you offer to the VPAA and/or to Professor T?**

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**Provost E is searching for a dean of an academic school. They have been approached by a department chair who is interested in the role, but this department chair does not yet have all the competencies that would prepare her to be effective in this vertical move. How would you advise Provost E to discuss their concerns about the chair's readiness for the role? What kind of plan would you recommend that Provost E develop with the chair?**



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**Provost Z is having a conversation with one of her directors, and they are talking about the director's professional aspirations. With absolute confidence, the director tells Provost Z, "I want to know how to get into your seat." Provost Z understands that because there is only one provost role, there is limited opportunity for the director to advance to a significant leadership position at the university. If you were Provost Z, how would you respond to the director?**



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**So let's imagine that you did, in fact, win the lottery and have just called a realtor and movers. What are the top five things that you would share with your interim successor?**



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**Thank you for attending  
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