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

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

- 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](http://www.businessdictionary.com) as the:
Identification and development of potential successors for key positions in an organization, through a systematic evaluation process and training.

**succession**
səkˈseʃən/ (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...
<table>
<thead>
<tr>
<th>No.</th>
<th>Office</th>
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<tbody>
<tr>
<td>1</td>
<td>Vice President</td>
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<td>2</td>
<td>Speaker of the House of Representatives</td>
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<td>3</td>
<td>President pro tempore of the Senate</td>
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<tr>
<td>4</td>
<td>Secretary of State</td>
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<td>5</td>
<td>Secretary of the Treasury</td>
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<td>6</td>
<td>Secretary of Defense</td>
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<td>7</td>
<td>Attorney General</td>
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<td>8</td>
<td>Secretary of the Interior</td>
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<td>Secretary of Health and Human Services</td>
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<td>Secretary of Housing and Urban Development</td>
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</table>
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
- Knowledge Management
- Workforce Capability & Capacity
- Individual Learning & Development
- Systematized Processes & Procedures
- 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.
Questions?
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
Strategies for Impact & Sustainability

Organizational Effectiveness

Organization Level

Center Goals

Program Level

Target Objectives
Effectiveness Measures
Guiding Principles

Activity Level
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

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<td>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.</td>
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## Curriculum Program

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## Outreach Program

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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
Questions?
Contacts

- Marilyn Barger, mbarger@hccfl.edu
- Phil Centonze, phil.centonze@floridamakes.com

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
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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

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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...