LDR 813, Organizational Dynamics

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November 9, 2024

Professor

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Assignment 2

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### *Developmental Readings*

Create Developmental Readings from seminal sources and scholarly peer-reviewed

journal articles. Review instructions for Assignment #3, the course essential elements,

and course readings to identify selections of books and journals to create entries.

* Refer to the “[Student Guide to Developmental Readings](https://drive.google.com/file/d/161V_FaYR2BnNGCSFUlWPjUSIQzcH04Hq/view?usp=share_link)” for updated information on sample comments, rubrics, and key definitions related to developmental readings.

**Continuity and Operational Stability: The Importance of Succession Planning in Organizations**

**Source One:** Barton, A. (2019). Preparing for Leadership Turnover in Christian Higher Education: Best Practices in Succession Planning. *Christian Higher Education (London, UK)*, *18*(1–2), 37–53. <https://doi.org/10.1080/15363759.2018.1554353>

**Comment 1**

**Quote/Paraphrase:**

“It is important that current leaders with power and influence carefully reflect on their understanding of succession planning as an approach to developing future leaders, including whether the desire for a personal legacy comes at the unacceptable price of an ineffective or ill-prepared succession. It is likely that many leaders historically understood succession planning to involve tapping a “good old boys” network of other individuals who looked and thought like them in order to ensure continuity of the work under way.” pp 38.

**Essential Element:** This comment is associated with the essential element, management theory and practices.

**Additive/Variant Analysis:** This comment is additive to my understanding of leadership and succession planning. The paragraph emphasizes the importance of leader reflection on developing leaders for the future and explores their need for personal legacy at the cost of effective leadership. Barton (2019) reflects on the “old boys club” phenomenon where systems of friendship, patriarchy and nepotism take priority based on similar thought processes and practice. The paragraph is also variant to my views around succession planning based on the conception of postmodern leadership that aligns with effective leadership and that also has moved away from a boys club to a more gender centric effective leadership succession planning. Though this position could be considered utopian.

**Contextualization:**  Succession planning has always been an important part of leadership. In my role as a social work leader, it is foremost on my mind as part of my sense of self and planning for the future but also planning around leader development that gives opportunities to my staff to lead so that we can assess readiness to lead.

**Comment 2**

**Quote/Paraphrase:** “Various inflexible and uncreative practices of workforce

planning has been identified as a core challenge for succession planning practices in higher education (Sanaghan, 2016). The often rigid and bureaucratic processes used for hiring, as well as professional development and promotion practices in higher education, tend to limit the ability of colleges and universities to be proactive in identifying prospective leaders who can address future needs (Adams, 2013; Mackey, 2008). Unlike the culture of most for-profit and other not-for-profit organizations, where employees view themselves as working for the organization as a whole, faculty typically see themselves as working for their academic guild—a dynamic that can contribute to less psychological commitment to the broader institution (Gunsalus, 2006; Vaillancourt, 2012)” pp. 41.

**Essential Element:** This comment is associated with the essential element, people problems in organizations.

**Additive/Variant Analysis:** This comment is additive to my understanding of challenges in implementing a succession plan in higher education institutions. Inflexible practices as they operate in bureaucratic colleges and universities limit the ability of these institutions to develop and implement succession planning strategies. Additionally, Barton (2019) points out that academic faculty in higher education see themselves as working within their profession and from a department rather than operating from the overall institution and limits organizational alignment and psychological belonging. This culture can result in disconnection from the needs of the institution and prospects for successive leadership.

**Contextualization:** Being a head of department for a University, there are important contextualization to my current situation. Working with a fairly large institution with a long British history has left the institution with many ordinances, committees and procedures that though sometimes useful can impact the process with succession planning. My institution has many policies, career path committees, staff development protocols and other documentation and committees that sometimes do not make for effective planning for the future. Notwithstanding this, there are sometimes opportunities to consider anomalies in the system.

**Source Two:** Jackson, B. A., & Allen, S. (2022). Succession planning for senior leaders: is it always a good idea? *International Journal of Educational Management*, *36*(5), 800–811. <https://doi.org/10.1108/IJEM-12-2020-0576>

**Comment 3**

**Quote/Paraphrase:** “Higher education (HE) institutions face many external challenges including decreased funding (Marcus, 2019), declining enrollment (Beyer, 2019), impending college closures (Seltzer, 2019), pandemics (Huelsman, 2020), increased competition, expanding use of online learning modalities, and new government policies and initiatives (Gigliotti, 2017). In seeking senior administrators to lead their institutions in such a challenging environment, institutions must decide whether to develop and promote leaders (e.g. deans and presidents) from within or to hire externally. While some authors argue that HE institutions should adopt succession planning (SP) practices common to the corporate sector (e.g. Baker et al., 2019; Barton, 2019; Cavanaugh, 2017; Fulton-Calkins et al., 2005; Ishak and Mustafa Kamil, 2016; Loomes et al., 2019; Lovett, 2017; Wallin et al., 2005), the HE sector’s unique culture and context raises questions about SP’s utility (Klein and Salk, 2013; Selingo et al., 2017). Internal barriers (e.g. preference for external candidates) may result in skepticism regarding the value of developing and maintaining systematic SP programs to meet future senior leadership needs, which may explain the low level of SP implementation in HE (Cavanaugh, 2017; Klein and Salk, 2013; Selingo et al., 2017).” pp.800

**Essential Element:** This comment is associated with the essential element, people problems in organizations.

**Additive/Variant Analysis:** This comment is additive to my understanding of succession planning and challenges faced by higher education institutions (HEIs). The passage highlights numerous challenges faced by HEIs in a postmodern society, that of competition, declined enrollment and lack of funding among others. This impacts succession planning for leaders of the institutions and ability to select from within or hire from outside the institution. HEIs are different from corporate companies and though some authors suggest that succession planning strategies can be adapted across, there are some peculiarities to consider. Though not highlighted by the chapter these could be the bureaucratic nature of many HEIs or the fact that educational institutions are slower to change that other organizations (maybe due to the former factor) or a myriad of other cultural factors. Jackson and Allen (2022) close the passage by highlighting that barriers within the institutions may impact the development and implementation of succession planning strategies and explains why so few institutions have succession plans.

**Contextualization:** The challenges highlighted by the author are not nuanced and have been experienced by my institution. I have had to implement different strategies to work on internal and external competition and work daily to seek funding to continue our programmes. I am in total agreement with Jackson and Allen (2022) that this does impact the succession planning process. There are factors around sustainability, need for change within institutions and bringing in new leaders from outside the institution with fresh ideas and approach to leadership while maintaining the status quo and without changing too much of the culture but also being mindful of developing leaders from within so as not to impact work ethic and morale of aspiring leaders. This is a great task and some leaders decide not to act and to allow the bureaucratic processes to follow through which can be detrimental to the operations of the institution.

**Comment 4**

**Quote/Paraphrase:** “Reviews of previous research (e.g. Baker et al., 2019; Klein and Salk, 2013) suggest that SP approaches that suit corporate contexts and cultures might not translate to academia because of factors such as: (a) the HE tradition of open, national searches for senior leaders; (b) shared

governance and the need to gain agreement from multiple stakeholders through selection committees; (c) assumptions that internal candidates will not make the needed changes or will be compromised by loyalty to institution insiders; (d) the positive reputational benefits for institutions of hiring an outsider; and (e) faculty lack of interest in entering administrative leadership roles. Specific institutions may face added challenges while implementing SP (e.g. small or under resourced institutions).”pp.802

**Essential Element:** This comment is associated with the essential element, management theory and practices.

**Additive/Variant Analysis:** This comment is additive to my understanding of the uniqueness of succession planning in higher education. Succession planning approaches from corporate companies do not necessarily translate to higher education institutions for a number of reasons. These include the belief that internal successions will not make the needed changes, that there should be an open call to fill senior leadership vacancies, governance structures and multilayered stakeholder approach to selection, academic faculty lack of interest in administrative leadership among others. The latter has a negative perception as having a debilitating effect on professional academic careers.

**Contextualization:** Contextually, many of these factors are aligned with my institution. My organization operates as a regional institution (1 of only 2 in the world) operating across 18 countries in the English speaking Caribbean. The final decision making body is the University Council consisting of all ministers of education across the countries and heads of government. Selection process for senior leadership across the five campuses is therefore time consuming, rigorous and bureaucratic. Though some might assume thoroughness, which is correct, the processes are sometimes cumbersome and impact the ability to be agile and respond to growing change.

**Comment 5**

**Quote/Paraphrase: “**Unstable and uncertain environments may also result in reduced financial and time-related investments in learning and growth, including SP, LD, and other forms of training (Cappelli, 2015; Cascio, 2014; Gearin and Gee, 2017; Murphy, 2005; Sheehan, 2014). While good practice suggests that SP and LD should be implemented consistently (Rothwell, 2015), environmental dynamism is likely to increase skepticism toward SP and LD investments. For

some, investing in SP and LD might detract from other opportunities.” pp. 804.

**Essential Element:** This comment is associated with the essential element, people problems in organizations.

**Additive/Variant Analysis:** This comment is additive to my understanding of averse factors impacting succession planning and other leadership development. Jackson and Allen (2022) have laid out in the section that financial and time related uncertainty may impact implementation of a succession plan and other staff development activities. They highlight that in times of instability utilizing resources for staff development and succession planning strategies could take away from other opportunities and needs of the institution.

**Contextualization:** As I read this passage, my mind was brought to my current institution. We are in a tight fiscal space with intermittent salary delays for a number of years. We have been operating in an uncertain environment for some time not just with external factors but internally, we are in a transformative time and there are activities for right sizing and possible redundancies. However, at the same time more than 50% of our senior leaders are scheduled to retire in 2 or 3 years. The succession planning mechanism through our career path blue book policy has not taken effect. This has implications for sustainability and operational efficiency. Change is inevitable but the actions of our leaders will tell the fate of our institution.

**Source Three:** Maduforo, A. N., Scott, S., & Scott, D. (2024). Leadership Development for Contemporary Post-Secondary Academic Leaders: Challenges, Content and Approach. *SAGE Open*, *14*(2). <https://doi.org/10.1177/21582440241253647>

**Comment 6**

**Quote/Paraphrase:** “In the context of leadership development in higher education, theories pertaining to leadership succession planning, as grounded in organizational development literature (Conger & Fulmer, 2003), emphasize the strategic significance of identifying and preparing future academic leaders. Prioritizing succession planning is imperative for academic institutions to ensure a smooth transition of leadership, fostering sustained effectiveness in addressing evolving challenges within the educational landscape (Conger & Fulmer, 2003; Kri et al., 2021). Drawing on a succession model that has historical roots in various realms, such as monarchies and major religions, this leadership theory has been employed for millennia to maintain control over countries and followers globally (Lister, 2023). Similarly, in the business world, organizations often adopt this model by promoting from within their existing leadership structure to retain control of business strategies and organizational direction (Lister, 2023). By cultivating an internal candidate for leadership roles, such as a dean or department head, academic institutions can ensure a deep understanding of the institution’s culture, educational goals, and strategic direction. This internal candidate can learn the intricacies of daily operations and engage with various stakeholders by observing and working alongside the current leader. This approach facilitates a seamless leadership transition, preventing any disruptions in academic operations that might arise if an external candidate were selected for a key leadership position.” pp. 4.

**Essential Element:** This comment is associated with the essential element, management theory and practice.

**Additive/Variant Analysis:** This comment is additive and variant to my understanding of theories of leadership succession planning. This theoretical position emphasizes the importance of seamless transition to leadership through a succession model similar to monarchies and religions. Based on this model, organizations promote leaders from within the organization to retain power and control of organizational direction similar to monarchies. Similarly, promoting academic faculty (Deans and Heads of departments) ensures continuity and understanding of organization culture and strategic direction. Operational activities can be learnt while shadowing the current leader. Variant to this view however, is the notion that leadership succession from outside the organization can be useful to bring about needed change that promote sustainability of the organization.

**Contextualization:** Within my experience as a leader at my university. I have had the opportunity to hire from corporate Jamaica to bring into the university. My observation is that there were some great initial benefits such as a new approach and perspective to challenges. However, the slower pace and nuances of the bureaucracies of the institution were frustrating to the new employee and we have to do a replacement from within the organization after two and half years upon their departure.

**Comment 7**

**Quote/Paraphrase:** “The benefits of leadership development extend across

leaders, institutions, and staff, encompassing competitive succession planning, talent attraction, talent retention, expanded networking, and enhanced capabilities to confront contemporary challenges in higher education. Leadership development is an ongoing, continuous process, and even the highest-ranking leaders in an institution should have a method of evaluating their leadership which could be through mentors, coaches, or advisors/counselors, staff, students and personal reflections (J.Burns et al., 2022; Turner et al., 2018). Establishing leadership development goals for a leader is imperative to stay abreast of the dynamic academic landscape characterized by rapid changes and challenges.” pp. 13

**Essential Element:** This comment is associated with the essential element, management theory and practice.

**Additive/Variant Analysis:** This comment is additive and variant to my understanding of leadership development. Leadership development is ongoing and includes a process of evaluation and personal reflection. Setting development goals for leaders is important to stay ahead of changes and challenges within the academic landscape. There are benefits to leadership development including “competitive succession planning, talent attraction, talent retention, expanded networking, and enhanced capabilities to confront contemporary challenges in higher education.”

**Contextualization**: Leadership development is crucial to succession planning and building a great team. Within my own context, I have been mentoring and coaching my research fellow to take on greater leadership opportunities within our small department, in particular when I am out of office. We have been through the process of setting development goals, evaluation and encouraging personal reflection of her leadership practice. This, I believe, is part of my calling to develop young women in the academy, an institution which traditionally saw mostly male leaders.

**Source Four:** Keerio, N., & Ahmad, A. R. (2023). Developing future leaders in Malaysian public universities: the factors influencing execution of succession planning. *Journal of Applied Research in Higher Education*. <https://doi.org/10.1108/JARHE-03-2023-0112>

**Comment 8**

**Quote/Paraphrase:** “In order to preserve some stability in key roles and help a company meet its goals, succession planning is well-defined systematic procedure in which workers are harmonized to critical jobs with ongoing development and growth plans (Desarno et al., 2021; Moin et al., 2021; Montoya, 2019). The description of essential jobs in succession planning is also a topic of controversy, with some companies concentrating solely on top positions. Meanwhile, some contend that succession planning need to be a thorough part of long-term strategy for continuous leadership development; the attention of succession planning ought to include the establishment of middle management and supervisory level posts (Avalos, 2020; Garcia, 2021). Preparing for succession is crucial for a number of additional reasons. Briefly put, succession planning assures the availability of candidates for important organizational roles, promotes diversity in the workplace and enhances job opportunities, staff growth plans and other human resource movement initiatives (Desarno et al., 2021; Geys et al., 2020; Owolabi

and Adeosun, 2021).” pp 2-3

**Essential Element:** This comment is associated with the essential element, people problems in organizations.

**Additive/Variant Analysis:** This comment is additive to my understanding of the importance of succession planning. Succession planning is an imperative part of maintaining stability in an organization by preserving key roles to meet goals and development needs, promote diversity, development of staff, growth plans and other human resource activities. The concept of key roles in organization does not have consensus as some organizations only consider senior leadership positions as essential in succession planning. However, others contend that middle management and supervisory positions ought to be considered in the process.

**Contextualization**: For a holistic team to be created all roles are important. Therefore including both senior leadership and middle management in succession planning strategy is important. In particular, roles that directly support the overarching strategy of the organization. I have often reflected this and believe succession can also be at lower levels in the organization, training up can be useful to boost staff morale.

**Comment 9**

**Quote/Paraphrase: “**Further, the findings suggested that there must be a champion/expert in the senior management for ultimate support the program’s successful implementation. To become a strategic precedence and have a completely incorporated succession planning programme, champion support is crucial. The people who can eventually apply management the most successfully are the biggest advocates of it. Senior executives and important human resources staff will be directed by the organisation’s mission and values but, more importantly, create an approach that involves effective configuration of specific guidelines or procedures that respect the culture.” pp. 10

**Essential Element:** This comment is associated with the essential element, management theory and practice.

**Additive/Variant Analysis:** This comment is additive to my understanding of advocacy for succession planning. For the success of a succession program, a champion in the senior leadership is imperative. Successful management personnel are the biggest advocates of this management technique. Senior leaders are guided by the mission and values of the organization and create guidelines that are signed to the culture of the organization.

**Contextualization:** Contextually, within my experience and institution there are champions for succession planning practice. In my previous employment the head of the department was not aligned with this type of approach and often did not get the support of some of her team members. The dynamics in the department became strained.

**Source Five:** Dahlan, D. A. (2024). Who is the next leader? Understanding women leadership development and succession planning in Saudi Arabian higher educational institutions. *Frontiers in Sociology*, *9*. <https://doi.org/10.3389/fsoc.2024.1442543>

**Comment 10**

**Quote/Paraphrase:** “ Leadership development and succession planning is a valuable strategy for closing the gender gap and providing an equal chance for males and females to be trained and involved in leadership roles. This strategy is an incredibly effective tool in higher education, where there is a significant disparity between male and female academic leaders. Despite its effectiveness, succession planning remained an overlooked component of the higher education system.” pp. 1

**Essential Element:** This comment is associated with the essential element, management theory and practice.

**Additive/Variant Analysis:** This comment is additive to my understanding of women’s leadership and succession planning. Gender considerations are an important part of the leadership development and succession planning discourse. There ought to be opportunities to close the leadership gender gap in higher education where there is notable “disparity between male and female academic leaders.”

**Contextualization:** Having both genders represented at the leadership level is important given the differences in thinking and leading displayed by both men and women. In particular, co-leadership is important because it is complementary for the leadership process. From my experience and comparison, co-leadership provides a more balanced approach to leadership and leader development.

**Source Six:** Krznaric, R. (2007). *How change happens: Interdisciplinary perspectives for human development*. Oxfam.

**Comment 11**

**Quote/Paraphrase:** “The empowerment of women has become one of the key goals of development intervention, and involves ensuring that women have the ability to make strategic life choices where this ability was previously denied (for example through access to resources and involvement in decision-making). Such thinking can be traced back to the increasing focus since the 1960s on women’s rights, experiences and histories across a range of academic disciplines such as sociology, political science and history and to the rise of feminist economics. ” pp. 38.

**Essential Element:** This comment is associated with the essential element, management theory and practice.

**Additive/Variant Analysis:** This comment is additive and variant to my understanding of women’s empowerment and interdisciplinary perspectives. Given the history of women’s disenchantment and inequality, women’s empowerment has become the goal of development intervention. Many disciplinary perspectives have taken a focus on women’s empowerment as a way to develop societies, this includes sociology, politics and political science and I would add theology. An interdisciplinary approach to women’s empowerment is key to change for women globally.

**Contextualization:** The empowerment of women is foremost on my mind and has been the focus of my work. Within the context as a woman leader planning for family, the researcher has reflected on these changes and for women within her industry and what it will and has meant. Additionally, the state of young women transitioning from University (my sector) into adult roles rests on the mind of the researcher given the unforeseen perspectives that this group often takes for granted. Contextually, my professional interest is geared towards how paid and unpaid work (including family) can coexist in harmony and how we can establish norms, starting with resocialization of gender roles and work structure changes to encourage symbiosis. As a social worker, enhanced social functioning of people (families and communities) is my calling to change the world and a key part of that is women’s empowerment from an interdisciplinary and multidisciplinary perspective.

**Source Seven:** Gordon, P. A., & Overbey, J. A. (Eds.). (2018). *Succession planning: Promoting organizational sustainability*. Springer.

**Comment 12**

**Quote/Paraphrase:** “A good succession plan must be structured and formalized. Organizational leaders and HR personnel must have a clear understanding of who will champion the strategic initiative, retain the organization's intellectual capital, build talent from within, and ensure leadership continuity (Collins & Collins, 2007; Harrell, 2016). Several authors have suggested that succession planning cannot effectively operate in isolation- it has to be integrated into the overall organizational strategy and become part of the culture (Gabour Atwood, 2007; Kouzes & Posner, 2017; Rothwell, 2015). ” pp. 16

**Essential Element:** This comment is associated with the essential element, management theory and practice.

**Additive/Variant Analysis:** This comment is additive and variant to my understanding of the structuring of succession planning. A succession plan is not a program that is created suddenly. It is structured and forms part of the strategic focus of the organization. It is not isolated from operations, mission or culture of the organization. A well-established succession plan protects the intellectual capital, promotes talent management and is aligned with smooth leadership continuity.

**Contextualization:** My current position is a good example for a well-established succession plan in operation. My former head of department supervised me for 10 years in my previous role as programme officer while preparing me for leadership. Sometimes I felt thrown into the deep end but these were opportunities to show my ability to be agile, think and respond on my feet and develop key leadership skills. Notwithstanding this, when the position became vacant on my supervisor’s retirement, I had to apply and do panel interviews with candidates from outside the institution and from a pool of global candidates. This I believe is a good example of succession planning that recognized the importance of the competitive nature of leadership selection.

**Works Cited**

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Practices in Succession Planning. *Christian Higher Education (London, UK)*, *18*(1–2), 37–53. <https://doi.org/10.1080/15363759.2018.1554353>

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