

Succession Planning

GFOA Fall Conference 2023

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my story

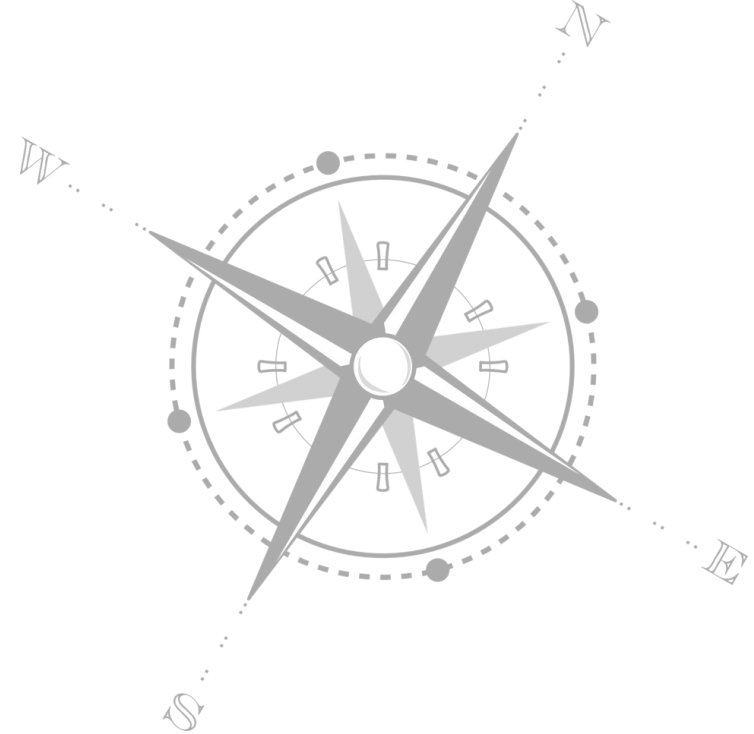


Objectives

WHAT - What is succession planning?

WHY - Why is succession planning important?

HOW - How did we created the Mason Momentum Strategy?



KEY to Succession Planning

Structure for our learning together

Check-in

Peak Moment - Read to Lead

Campfire Conversation

Backpack Items



Check-in



What is one of your favorite fall traditions?

Succession Planning is...



Peak Moment - Read to Lead



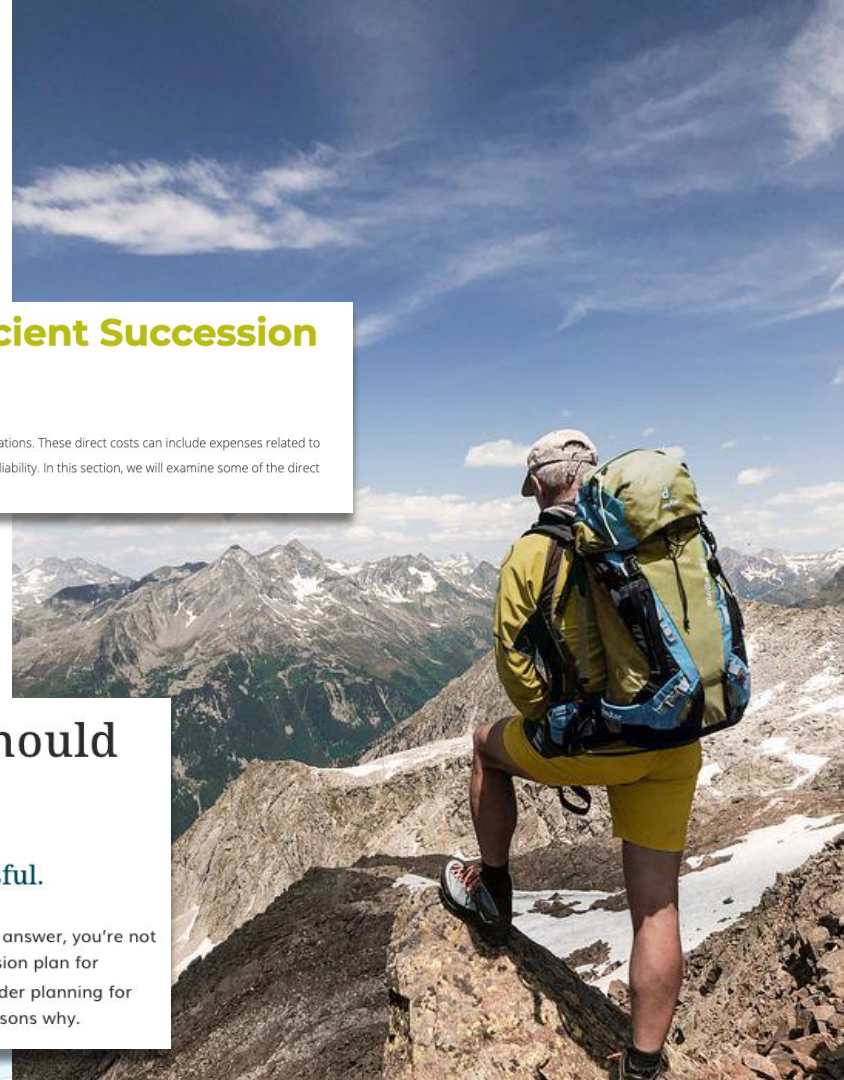
The Direct Costs of Insufficient Succession Planning

Failing to plan for leadership succession can have serious financial consequences for organizations. These direct costs can include expenses related to recruiting and training new leaders, lost productivity and revenue, and increased risk of legal liability. In this section, we will examine some of the direct costs associated with insufficient succession planning.

Top Five Reasons Every Business Should Have a Succession Plan

A good succession plan can help your business be more successful.

What would you do if you lost one of the leaders of your company? If you don't have a detailed answer, you're not alone. In fact, one study showed that nearly 60% of small-business owners don't have a succession plan for themselves,¹ let alone for their top executives. If this is true for your company, you should consider planning for leadership succession as soon as possible. The benefits of it can be enormous. Here are five reasons why.



Campfire Conversation

One of the things we often miss in succession planning is that it should be gradual and thoughtful, with lots of sharing of information and knowledge and perspective, so that it's almost a non-event when it happens.

Anne Mulcahy - former CEO of Xerox



Campfire Conversation Cont... Replaceable?

TECH | PERSONAL TECHNOLOGY: JOANNA STERN

I Cloned Myself With AI. She Fooled My Bank and My Family.

Our columnist replaced herself with AI voice and video to see how humanlike the tech can be. The results were eerie.



By *Joanna Stern* [Follow](#)

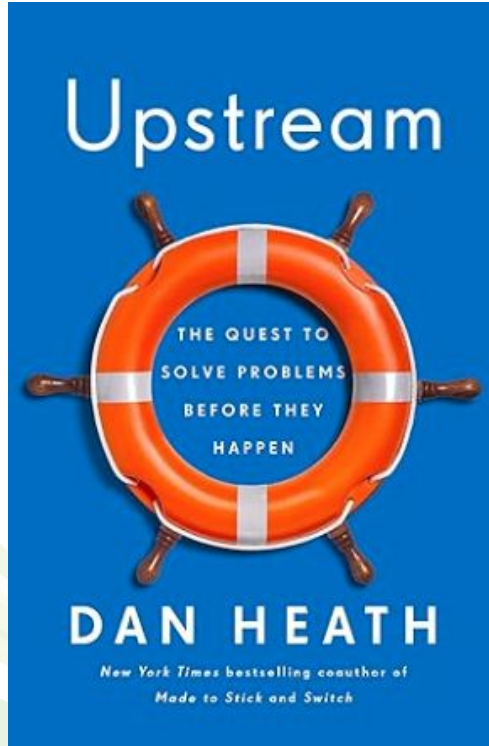
Updated April 28, 2023 7:58 am ET

- ✓ Family
- ✗ TikTok
- ✓ Banking
- ✗ Video Team Call

Campfire Conversation Cont... The Surprise!



Upstream Thinking - Culture Standard



Proactive Mindset

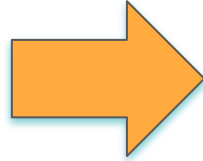
Systematic Approach

Collaborative

Long-term Perspective - Vision

Anchored in Culture / Beliefs / Values

Upstream Conditions → Super Bloom Culture



HOW did we create super bloom conditions?

- Rhythm of Work
- Communication Cadence
- Recruiting and Retention
- Strengths & Goal Setting
- OKRs

MCS Members	Focus	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Aligning and Developing District Leaders	Think Time (8:00-10:00AM bookend) Executive Team 11:30-1:30PM DLT Prep / OKR Review	DLT	Admin Weekly Think Time (8:00-9:00AM) Learner Success Team Paraprofessional Leadership Team (4:00-5:30PM) Walk-through Wednesdays	Finance (7:30AM Oct, Feb, May, June) Arts and Activities (7AM Aug, Oct, Dec, Feb, April, May) Athletics (7AM Aug, Oct, Jan, April)	ALT Think Time (2:00-4:00PM bookend)
Communication				Admin Weekly		5 on Friday + Rock Talk District Family Communication
Week 2	Building Planning and Reflection	Think Time (8:00-10:00AM bookend) one on one updates	Executive Team Mtg Big Rock Leads BOE Work Session (5:30 - 8:30 PM)	Admin Weekly Think Time (8:00-9:00AM) Learner Success Team MPAC (4-6PM)	Policy (7:30AM Oct, Feb) Student Achievement (8:00-9:30 AM Sep, Nov, Jan, Mar, May)	Central Connect Time (Events: Aug, Oct, Dec, Feb, April) Mtg: Sept, Nov, Jan, March, May) Think Time (2:00-4:00PM bookend)
Communication				Admin Weekly		5 on Friday

2023-2024 OKRS

OBJECTIVES <i>What do we want to achieve?</i>	KEY RESULTS <i>How will we know if we're on track?</i>	2023-2024 STRATEGIES <i>What shared strategies will we use to get there?</i>	District Team Role	Building/Department Team Role	Glossary
<p>#1 Ensure growth for each learner through personalized experiences</p> <p>Academic Outcomes Through Personalization</p>	<p>1.A. Each Comet shares and reflects upon individual growth goals) at least once per quarter</p> <p>1.B. 100% of core area teachers and specialists use shared, relevant student data to inform instructional design, at least monthly</p> <p>1.C. District-selected learning practices observed in >80% of walkthroughs by fourth quarter</p>	<p>DESIGN, BUILD, AND IMPLEMENT CONSISTENT, ALIGNED SYSTEMS</p> <ul style="list-style-type: none"> IMPLEMENT GOAL-SETTING SYSTEMS: By implementing student and staff individual growth aligned to our district objectives and Big Rocks, we will further build a culture of personalization for each learner REINFORCE FOUNDATIONAL PRACTICES: By reinforcing shared learning agreements (including Unit Learning Essentials, Unit Guides, and Checkpoints) through multiple means (e.g., walkthroughs, observations, OTEs, department meetings), we will strengthen Tier 1 instructional practices and ensure personalized learning experiences that are aligned to our Big Rocks. CONSTRUCT LEARNER-CENTERED SYSTEMS OF SUPPORT GUIDE AND PLAYBOOK: By creating an MCS Learner-Centered Systems of Support Guide, Playbook, and timeline for implementation through collaboration with staff from all buildings, we will be able to offer more consistent, personalized, and preventative supports to ensure each student grows <p>MAXIMIZE SHARED STUDENT DATA SOURCES</p> <ul style="list-style-type: none"> SUPPORT DATA-INFORMED INSTRUCTIONAL DESIGN AND STUDENT GOAL-SETTING: By providing educators with consistent tools and time to use shared student data sources (including MAP, Ohio Readiness, Checkpoints) to inform instructional design and support individual student goal setting, students' ownership of learning will increase as they engage in learning that is relevant and personalized <p>SUPPORT MEANINGFUL, AUTHENTIC PROFESSIONAL LEARNING</p> <ul style="list-style-type: none"> LEVERAGE LEARNING WALKS & WALKTHROUGHS: By continuing regular walkthroughs and engaging educators in each building in quarterly learning walks using shared personalized learning "look fors" and a common way to collect insights, we will see growth in the use of 	<p>With DLT Escalator Team will provide guidance, energy, and supports for staff to implement goal setting systems districtwide. Learning Experience Team will provide supports for educators (1) to implement goal setting systems in their classrooms (e.g., sharing strategies, designing professional learning, curating resources) and (2) to understand the role of goal setting in personalized learning.</p> <p>Learning Experience Team w/ Teacher Leaders and departments will support the continued development of shared learning agreements throughout the 23-24 school year.</p> <p>Learner Success Team will design and facilitate a collaborative process to co-create MCS Learner-Centered Systems of Support Guide, Playbook, and timeline for implementation.</p> <p>Learner Success Team and Innovative Systems Officer will develop and share tools and resources for data visualization. Learner Success Team will convene administrators to examine district-level data to inform curricular and instructional goals and resources, and provide models for engaging in similar building-level data-informed meetings.</p> <p>Learning Experience Team will define personalized learning "look fors" and a protocol for learning walks in collaboration with building admin. Learning Experience Team will develop a logistics plan (i.e., schedule, subs, communication) for implementation of quarterly learning walks. Executive Team and Learner Success Team members consult at least 10</p>	<p>Building / department teams will (1) leverage/create professional growth plans as a place for individual goal setting, (2) at least quarterly, create opportunities for staff members to share and reflect upon personal goals, (3) create ongoing opportunities to check in and monitor progress of student/staff goal setting systems</p> <p>Administrators (1) endorse the development process, (2) use the learning essential outcomes in OTEs and coaching conversations with teachers, and (3) protect time allowing teacher leaders and departments to guide the development of this work.</p> <p>Building administrative teams will (1) identify building team members, (2) convene and facilitate building team meetings as determined by district working group, and (3) provide key input into guide and timeline for implementation.</p> <p>Building Instructional Leadership Teams (including building admin, LEds, teacher leaders) will co-create opportunities for educators to examine and respond to student data to inform instructional planning and student goal-setting, including dedicated time following fall and winter MAP administration (grades 1 - Algebra) and Ohio Readiness Assessments (grades 3-5).</p> <p>Administrators endorse, participate in, and support implementation of learning walks. Building admin teams partner with LEds to support implementation plan. All administrators and LEds complete 20 walkthroughs per month using a shared data collection tool.</p>	

HOW we created the Mason Momentum Strategy?

Mass **X** Speed **+** Direction **=** Momentum

CommUNITY Sourced Shared Vision

Big Rocks Foundation

Systematic Approach to Leadership Succession

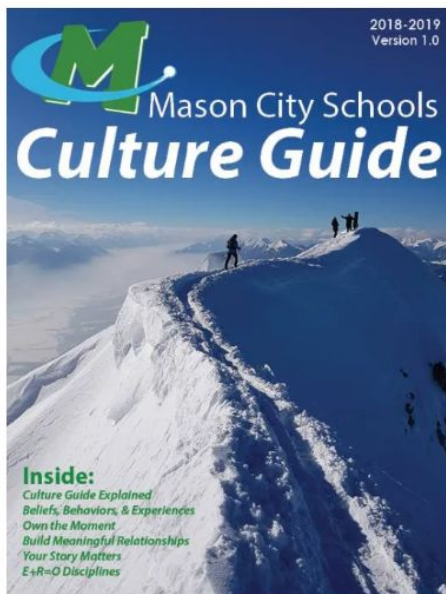
KEY to Succession Planning = Culture



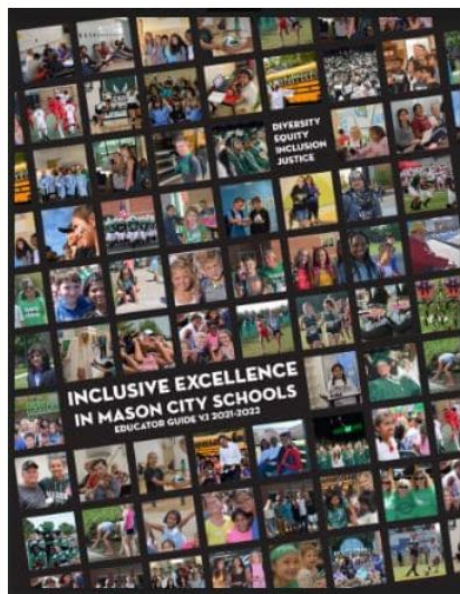
Culture

CommUNITY Sourced - 3 Big Rocks

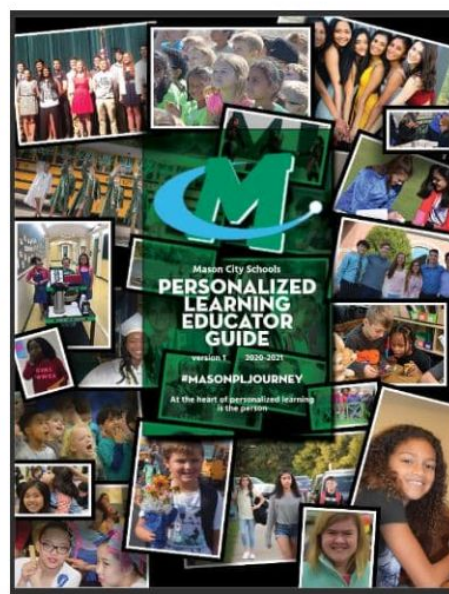
Culture



Inclusive Excellence



Personalized Learning



Beliefs

Mason City Schools Beliefs, Behaviors & Experiences (BBE)

BELIEFS	BEHAVIORS	EXPERIENCES
 OWN THE MOMENT	<ul style="list-style-type: none">• Do the right thing, especially when it's hard.• Take responsibility for your actions.• Embrace new challenges and find your passion in learning.	<i>Better today than yesterday, better tomorrow than today</i>
 BUILD MEANINGFUL RELATIONSHIPS	<ul style="list-style-type: none">• Invest the time to care, listen, and connect.• Respect and encourage each other.• Talk to people, not about people.	<i>We are stronger together</i>
 YOUR STORY MATTERS	<ul style="list-style-type: none">• Believe in who you are and who you can become.• Build on your strengths and learn from others.• Care for yourself and your surroundings.	<i>Everyone feels valued</i>

WHAT is succession planning?

Succession planning is the **process** of identifying the critical positions within your organization and developing action plans for individuals to assume those positions. Taking a **holistic view of current and future goals**, this type of preparation ensures that you have the **right people in the right jobs** today and in the years to come.

University of Washington

Considerations

- Identifying and map critical positions and transition opportunities
- Systematic approach to leadership development to meet future needs
 - a. key competencies, skills, leadership approach / fit
- Continuity Documentation - guidebooks, SOPs, forecast analysis, cross training
- Communication strategy - on stage / off stage

WHAT is succession planning?

Seven Leading Practices to Consider:

1. Identify skills, experience and personal traits for the position
2. Clear roles and responsibilities - Who owns the leadership succession process?
3. Documented plan, timeline and process
- 4. Well-defined emergency plan or back-up plan**
5. Planning process is in collaboration with key leaders
- 6. Strong leadership pipeline program**
7. Comprehensive onboarding process and communication strategy

WHAT is succession planning?

1. **Define your legacy**
2. Plan in phases
3. Aim for continuity
4. Begin with the end in mind
5. Be intentional and supportive
6. Create a visible career path
7. Identify successors
8. Retain your talent with future possibilities
9. Be a conduit to key relationships
10. **Create an exit strategy**

WHY is succession planning important?

Continuity/Consistency

Cost Effectiveness

Confidence

Courage

Analysis suggests that the market value wiped out by badly managed CEO and C-suite transitions in the S&P 1500 alone is close to \$1 trillion a year. Better succession planning could, by contrast, help the large-cap U.S. equity market add a full point to the 4% to 5% annual gains Wall Street projects for it.

The main costs of ill-considered successions remain poor performance by outsider CEOs, loss of C-suite intellectual capital at the firms that CEOs and other top executives leave behind, and ill-prepared internally promoted executives. - HBR

HOW did Elaine's succession journey go?

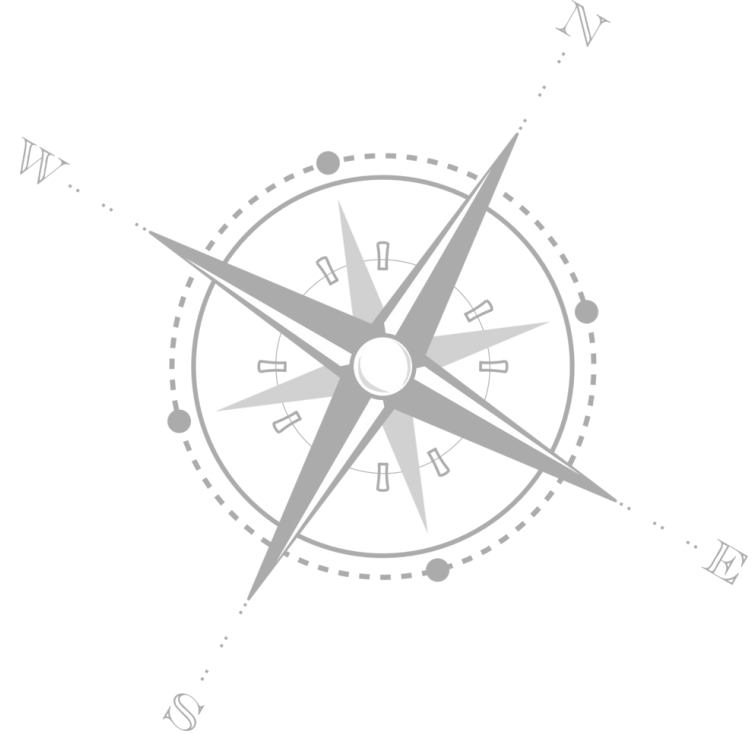


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Backpack Item - Check-out

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