Professional Development Committee Succession Planning 1991-1993

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Pre-Microfilm Inventory

Collection: Bowling Green State University
Administrative Staff Council, UA-022

Location: Bowling Green, Ohio

Title of Series: Professional Development Committee Succession Planning

Inclusive Dates: 1991-1993

Format: Bound X Loose

Order: Alpha X Chronological __ Numerical

Index: Included ___ Separate X None

Notes
November 4, 1991

Memorandum

To: Paul Olscamp
    President

From: Josh Kaplan
    Chair, Administrative Staff Council

Administrative Staff Council is in the process of developing a succession planning review process program for Bowling Green State University Administrative Staff members. The development and eventual implementation of this process will assist the university in providing an "Environment for Excellence" for faculty, staff, and students. This program will also provide the university with a mechanism to better build and maintain team continuity. Such continuity is extremely important in helping the university achieve its varied educational goals.

Enclosed is a copy of a survey that will be delivered to members of the Ad Council on November 14. We wanted you to have an opportunity to look it over before that date. Administrative Staff Council supports succession planning as part of strategic planning for the future of BGSU. We hope you will endorse our efforts. This survey is the first step towards approval and implementation of a plan.

Following is our timeline for the approval of succession planning:

- November 14: Distribute survey to Ad Council Members
- November 25: Survey returned by Ad Council Members
- November 27: Administrative Staff Professional Development Committee tabulates results of survey
- December 2: Distribute survey to second level administration
- December 9: Survey returned from second level
- December 18: ASC Professional Development Committee tabulates and collates results
- December: Josh Kaplan introduces succession planning to Board of Trustees
- Jan./Feb.: Write succession plan based on results of survey
- March: Formal presentation to Ad Council
- April/May: Revisions, etc
- June: Present for approval at Board of Trustees meeting

The first steps of implementation will begin after the approval by the Board of Trustees. The ASC Professional Development Committee, chaired by Pat Green, welcomes any questions, concerns or suggestions from you about this survey. Thank you for your consideration.

cc: John Moore, Personnel Services
    Pat Green, ASC Professional Development
Succession Planning Survey

Strategic Planning for the Future

Administrative Staff Council
1991-92
Succession Planning Survey

Please circle the answers that most accurately reflect your opinion. Thank you.

1. Are you willing to commit available resources for human resource planning?
   - Yes
   - No
   - Uncertain

2. Are you willing to integrate human resource planning with your strategic planning?
   - Yes
   - No
   - Uncertain

3. Will you support temporary interdepartmental transfers when there are no vacancies?
   - Yes
   - No
   - Uncertain

4. Will you assign staff to identify needs and prepare and coordinate development programs for promotable candidates?
   - Yes
   - No
   - Uncertain

5. Will you provide management development opportunities for those who are not considered to be "high potential?"
   - Yes
   - No
   - Uncertain

6. Will you support cross training of first line supervisors?
   - Yes
   - No
   - Uncertain

7. Can recruitment objectives be linked with human resources planning recommendations?
   - Yes
   - No
   - Uncertain

8. Can recruitment and human resource planning discussions be on a scheduled basis?
   - Yes
   - No
   - Uncertain

9. Will you support career planning discussions on a scheduled basis?
   - Yes
   - No
   - Uncertain

10. Are you willing to identify potential successors for key positions?
    - Yes
    - No
    - Uncertain

11. Will you support developing career paths for specific job groups?
    - Yes
    - No
    - Uncertain
### Succession Planning Survey

12. Would you be willing to implement a consistent university wide performance evaluation system?  
   - Yes  
   - No  
   - Uncertain

13. Will you be receptive to evaluating personnel at least annually in terms of both performance and potential for other positions?  
   - Yes  
   - No  
   - Uncertain

14. Are you willing to provide assessments of the potential of your staff to a central Human Resources Planning group?  
   - Yes  
   - No  
   - Uncertain

15. Will you support the use of objective assessment methods for identifying future potential of candidates for key management positions?  
   - Yes  
   - No  
   - Uncertain

16. Should human resource planning data be kept separate from personnel files?  
   - Yes  
   - No  
   - Uncertain

17. Will you be willing to treat employee data as a corporate resource rather than a departmental resource?  
   - Yes  
   - No  
   - Uncertain

18. Will you be willing to tell staff how they have been assessed?  
   - Yes  
   - No  
   - Uncertain

19. Should human resource planning data be used when making promotability decisions?  
   - Yes  
   - No  
   - Uncertain

20. Should data be available for the senior executive decisions?  
   - Yes  
   - No  
   - Uncertain

21. Would you be willing to support the development of position titles built on functions consistent with the job function?  
   - Yes  
   - No  
   - Uncertain

22. Would you be willing to support the consistent use of titles for similar positions?  
   - Yes  
   - No  
   - Uncertain
November 27, 1991

MEMORANDUM

To: Clifton H. Boutelle  
Director  
Public Relations

From: Josh Kaplan, Chair, Administrative Staff Council  
John Moore, Director, Personnel Services  
Pat Green, Chair, ASC Professional Development Committee

Change is inevitable. The grooming of the successor, the preparation for transition, and the transition itself are designed to bring change under an organization's control and as a part of the strategic plan. In the corporate world, this is known as succession planning.

Administrative Staff Council is in the process of developing a succession planning program for Bowling Green State University Administrative Staff members. The development and eventual implementation of this program will assist the university in providing an "Environment for Excellence" for faculty, staff, and students. Succession planning will also provide the university with a mechanism to better build and maintain team continuity. Such continuity is extremely important in helping the university achieve its varied educational goals.

To assist us in developing a succession planning program, we need your input. Would you please complete, sign and date the enclosed survey and return to Pat Green, Chemistry Department, by Monday, December 9. If you have any questions, concerns or suggestions, please use the back of the survey form.

Thanks for your cooperation in this matter.

PG:aaf  
Enclosure
December 2, 1991

Memorandum

To: Marshall Rose
   Director, Affirmative Action

From: Pat Green
      Chair, ASC Professional Development Committee

On behalf of the Professional Development Committee I want to thank you for taking the time to meet with us and discuss succession planning. Also, thank you for writing a memo to include with the mailing of our surveys. Your support and involvement with our committee is greatly appreciated.

I want to confirm that at every step of the development of the plan we will consult you to make sure there are no questions about the compatibility of succession planning with affirmative action guidelines. As we said in the meeting, we intend to fully comply with affirmative action and create a program that will create consistencies on campus that will enhance affirmative action.

Once again thank you for your participation. I will contact you when we have received the surveys and tabulated the results.

cc: John Moore
    Josh Kaplan
MEMORANDUM

TO: Pat Green, Chair
ASC Professional Development Committee

Josh Kaplan, Chair
Administrative Staff Council

John Moore, Executive Director
Personnel Services

FROM: Marshall Rose, Director
Affirmative Action

RE: Affirmative Action, Succession Planning and BGSU

DATE: December 2, 1991

I appreciated meeting with the ASC Professional Development Committee to discuss your succession planning proposals. I am pleased to note ASC's continued support for the University's affirmative action and diversity efforts, and it appears your succession planning proposals will take special care to complement rather than conflict with our objectives in these areas.

I am also encouraged by the potential of succession planning to positively enhance our equal opportunity efforts. Although I would want to see your final recommendations, the consistency, uniformity, improved morale, training opportunities, employee mobility, and personnel development that are usually associated with succession planning will surely benefit the University. I welcome the indepth strategic analysis of the University's human resources, since a close examination of employee utilization is also essential in our affirmative action and diversity efforts. In attempting to lay the foundation for the wisest use of our personnel resources, your succession planning proposals will strengthen our affirmative action initiatives. As long as we develop our succession planning program with our affirmative action and diversity interests in mind, I do not foresee any problems.
Finally, I am pleased to note the general interest that the University's senior officers have taken in your proposals. Obviously their strong support will be necessary for your success. Since I do believe succession planning has such positive potential for our equity efforts, I am eager to see tangible steps taken. If I can be of any additional assistance, please do not hesitate to contact me.

Continued best wishes.

MR
December 3, 1991

Memorandum

To: Robert Martin
Vice President for Operations

From: Pat Green
Chair, ASC Professional Development Committee

Re: Succession Planning Survey

The professional development committee has taken steps to address the concerns of Ad Council regarding succession planning and the completion of the survey.

On Wednesday, November 27th the committee and John Moore met with Marshall Rose to discuss succession planning and affirmative action. As a result of that meeting, Marshall is supportive of the principals of succession planning. The committee has agreed to work directly with him in the development of the plan to assure affirmative action and diversity are an integral part of the plan. In addition, the plan will be developed to enhance affirmative action by recommending that current inconsistencies such as position titles and performance evaluation formats be made uniform across campus. The plan will not be presented to Ad Council until Marshall has approved it. Enclosed is a copy of a memo that Marshall sent to us indicating his support.

On Monday, December 2nd the succession planning survey, a cover memo and a copy of Marshall's memo was mailed to all deans, directors and others on campus who report directly to the president or to one of the vice presidents. We have asked these persons to return the survey by Monday, December 9.

I hope this satisfies the concerns of the Ad Council. The committee would appreciate if you would complete the survey and return it to me by Monday, December 9. The committee plans to meet shortly after that date to tabulate the results. We will be glad to provide you with the results of the tabulation.

Thank you once again for your cooperation.
Succession Planning

Strategic Planning for the Future

Administrative Staff Council
1991-92
Introduction To
Succession Planning

"What is Succession Planning?" Succession Planning is a natural step after strategic planning in an organization. It locates and grooms replacement candidates for future openings in key positions and serves as an implementation strategy for organizational plans for decisions concerning human resource needs.

No team is forever. Just when it appears things are running smoothly, things happen to top people: new job, sudden illness, retirement or reassignment.

Universities that do not prepare for change are sometimes paralyzed for months as they look for replacements. That is why succession planning is so important. It helps manage change on an organizational level and retain the best people.

With Succession Planning, one can create "what if" scenarios. For example, "what if the vice-president for student affairs left?" With a succession plan, persons would have already been identified as potential candidates for the position. One obvious advantage is saving dollars on recruitment costs. Training expenses can be reduced because persons from within the university could be promoted or reassigned instead of bringing in new employees every time.

Succession Planning can aid in retention, boost morale and thus increase productivity. Employees will begin to see that there are opportunities for them within the University, and that good people actually do get promoted in a timely fashion. "This University does care about me. They're planning and preparing me for my next job as well as preparing my potential immediate successor(s)." A person isn't blocked in terms of upward mobility or lack of replacement. Consequently, the university will retain all those good people in whom it has a considerable investment.

A Succession Planning Program will be developed and implemented with Affirmative Action and diversity interests in mind. The program will complement rather than conflict with the University objectives in these areas.
Summary, PERS Information

<table>
<thead>
<tr>
<th>COST of Adding ERIP</th>
<th>2 yrs</th>
<th>3 yrs</th>
<th>4 yrs</th>
<th>5 yrs</th>
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<tbody>
<tr>
<td>Avg cost to purchase based on current employee mix</td>
<td>67%</td>
<td>105%</td>
<td>159%</td>
<td>211%</td>
</tr>
<tr>
<td>Per JCD, avg cost to purchase each year in last buyout—35%/year</td>
<td>70%</td>
<td>105%</td>
<td>140%</td>
<td></td>
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</tbody>
</table>

SAVINGS

<table>
<thead>
<tr>
<th></th>
<th>Classf.</th>
<th>Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRP (supplemental retirement fund)</td>
<td>138.0%</td>
<td></td>
</tr>
<tr>
<td>PERS payments on SRP @13.3%</td>
<td>18.4%</td>
<td></td>
</tr>
<tr>
<td>Replacement savings*</td>
<td>26.4%</td>
<td>15.7%</td>
</tr>
<tr>
<td>Other?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERS on replacements-saved insurance savings</td>
<td>3.5%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Total**</td>
<td>26.4%</td>
<td>172.1%</td>
</tr>
</tbody>
</table>

*Savings assume that classified staff could be replaced at an average savings of $6700 per person by replacing at the entry level classification. $6700 divided by average classified salary of $25,328 among the eligible group is 26.4%.

It is further assumed that administrative staff could be replaced at an average savings of $7500 per person; average salary for administrative staff in the eligible group is $47,767.

**The classified staff compose 80% of the total staff; the administrative staff compose 20%.

Classified 80% times savings | 21% |
Admin Staff 20% times savings | 34% |
Total Savings | 56% |

In 1987-88 buyout

78 staff retired (11 administrative; 67 classified)
52 of the classified staff were replaced at 80% of original cost
(Thus 24% of the classified staff were not replaced)

Average cost to buy the three years was $19,000 pr person;
Total cost was $1.5 million.
Succession Planning Chronology and Timetable

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 18, 1991</td>
<td>Survey mailed to members of Ad Council</td>
</tr>
<tr>
<td>November 25, 1991</td>
<td>Deadline for Ad Council - Ad Council did not respond due to some affirmative action concerns</td>
</tr>
<tr>
<td>November 27, 1991</td>
<td>Professional Development Committee met with Marshall Rose, Affirmative Action and received his endorsement.</td>
</tr>
<tr>
<td>December 2, 1991</td>
<td>Survey mailed to second level administration along with a statement from Marshall Rose, Affirmative Action. This statement also mailed to members of Ad Council.</td>
</tr>
<tr>
<td>December 16, 1991</td>
<td>Tabulation of Survey and evaluation</td>
</tr>
<tr>
<td>January 16, 1992</td>
<td>Glossary of term developed and distributed to Professional Development Committee. Original timetable revised</td>
</tr>
<tr>
<td>February 14, 1992</td>
<td>Introduction to Succession Planning statement reviewed</td>
</tr>
<tr>
<td>February 25, 1992</td>
<td>Presentation to ASC Executive Board for approval</td>
</tr>
<tr>
<td>March 5, 1992</td>
<td>Presentation to ASC for approval</td>
</tr>
<tr>
<td>April, May, 1992</td>
<td>Revise and finalize plan</td>
</tr>
<tr>
<td>September, 1992</td>
<td>Present to Ad Council for approval</td>
</tr>
<tr>
<td>October, 1992</td>
<td>Present to Board of Trustees for approval</td>
</tr>
</tbody>
</table>
Introduction To
Succession Planning

"What is Succession Planning?" Succession Planning is a natural step after strategic planning in an organization. It locates and grooms replacement candidates for future openings in key positions and serves as an implementation strategy for organizational plans for decisions concerning human resource needs.

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Universities that do not prepare for change are sometimes paralyzed for months as they look for replacements. That is why succession planning is so important. It helps manage change on an organizational level and retain the best people.

With Succession Planning, one can create "what if" scenarios. For example, "what if the vice-president for student affairs left?" With a succession plan, persons would have already been identified as potential candidates for the position. One obvious advantage is saving dollars on recruitment costs. Training expenses can be reduced because persons from within the university could be promoted or reassigned instead of bringing in new employees every time.

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A Succession Planning Program will be developed and implemented with Affirmative Action and diversity interests in mind. The program will complement rather than conflict with the University objectives in these areas.
Succession Planning Steps

Step One
Identify Participants

Step Two
Complete Personal Development History

Step Three
Complete Management Inventory

Step Four
Complete Organizational Planning Chart
Succession Planning - a natural step after strategic planning, it locates and grooms replacement candidates for future openings in key positions and serves as an implementation strategy for organizational plans for decisions concerning human resource needs.

Human Resource Management - includes many of the traditional personnel functions, such as recruitment, selection, appraisal, and compensation of employees. A key function here, in relation to career development, is human resource planning - the process by which an organization determines career characteristics of its employees and balances them against future work-force needs.

Human Resource Development - includes training, education, and development of employees. In training, employees acquire the skills needed to perform their present jobs. In education and development, they prepare for future jobs or for growth in general within the organization.

Organizational Development - includes enriching and enlarging the scope of jobs and building teams and strategies to increase the productivity of work groups.

Career Planning - refers to a process by which individuals determine their skills, interests, and values; consider which options "fit" them; and set goals and establish plans for achieving their goals.

Management Inventory - form used to identify a pool of candidates with extensive growth potential. This form must be completed in its entirety by the manager - this is not a performance appraisal.

Personal Development History - form completed by the employee which provides up-to-date work history, education, training, honors and professional affiliations.

Job Rotation or Interdepartmental transfers - employees under succession planning have an opportunity to try out other functional work areas.

Corporate (University) Resources vs Departments Resources - under a succession planning plan those employees who have been identified as high potential promotability will be groomed for positions University wide - not just college or department wide.

Strategic Planning - strategic planning is one of four human resource structures (the others are forecasting, succession planning, and skills inventories) that attempt to reconcile in deliberate ways the future plans of the organization with its expected staffing requirements and its need to develop people for key positions.
Succession Planning Survey Results

58 Surveys distributed
34 Surveys returned

1. Are you willing to commit available resources for human resource planning?  
   - Yes: 25  
   - No: 0  
   - Uncertain: 6

2. Are you willing to integrate human resource planning with your strategic planning?  
   - Yes: 30  
   - No: 0  
   - Uncertain: 1

3. Will you support temporary interdepartmental transfers when there are no vacancies?  
   - Yes: 14  
   - No: 1  
   - Uncertain: 15

4. Will you assign staff to identify needs and prepare and coordinate development programs for promotable candidates?  
   - Yes: 16  
   - No: 2  
   - Uncertain: 10

5. Will you provide management development opportunities for those who are not considered to be "high potential?"  
   - Yes: 18  
   - No: 3  
   - Uncertain: 10

6. Will you support cross training of first line supervisors?  
   - Yes: 26  
   - No: 2  
   - Uncertain: 5

7. Can recruitment objectives be linked with human resources planning recommendations?  
   - Yes: 32  
   - No: 0  
   - Uncertain: 1

8. Can recruitment and human resource planning discussions be on a scheduled basis?  
   - Yes: 24  
   - No: 1  
   - Uncertain: 8

9. Will you support career planning discussions on a scheduled basis?  
   - Yes: 29  
   - No: 2  
   - Uncertain: 3

10. Are you willing to identify potential successors for key positions?  
    - Yes: 28  
    - No: 1  
    - Uncertain: 4

11. Will you support developing career paths for specific job groups?  
    - Yes: 26  
    - No: 1  
    - Uncertain: 6
### Succession Planning Survey Results

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>Uncertain</th>
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<tbody>
<tr>
<td>12. Would you be willing to implement a consistent university wide performance evaluation system?</td>
<td>23</td>
<td>4</td>
<td>7</td>
</tr>
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<td>13. Will you be receptive to evaluating personnel at least annually in terms of both performance and potential for other positions?</td>
<td>32</td>
<td>0</td>
<td>1</td>
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<tr>
<td>14. Are you willing to provide assessments of the potential of your staff to a central Human Resources Planning group?</td>
<td>26</td>
<td>0</td>
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<td>8</td>
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<td>16. Should human resource planning data be kept separate from personnel files?</td>
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<tr>
<td>17. Will you be willing to treat employee data as a corporate resource rather than a departmental resource?</td>
<td>21</td>
<td>1</td>
<td>11</td>
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<tr>
<td>18. Will you be willing to tell staff how they have been assessed?</td>
<td>32</td>
<td>0</td>
<td>2</td>
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<tr>
<td>19. Should human resource planning data be used when making promotability decisions?</td>
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<tr>
<td>20. Should data be available for the senior executive decisions?</td>
<td>24</td>
<td>2</td>
<td>7</td>
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<tr>
<td>21. Would you be willing to support the development of position titles built on functions consistent with the job function?</td>
<td>25</td>
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<td>22. Would you be willing to support the consistent use of titles for similar positions?</td>
<td>23</td>
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Succession Planning  
"Yes"
Succession Planning Survey Results
Uncertain

<table>
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Uncertain
Administrative staff members are committed to Bowling Green State University. Maximizing each person's potential as a human resource is important to the ongoing mission of this institution. Since 1991, the Administrative Staff Professional Development Committee has actively explored the question of maximizing employees' resources by reviewing innovative quality improvement approaches. This lengthy review process included consultations with Jim Severs (Columbus-based management consultant), John Moore, executive director, Personnel Services and Christopher Dalton, vice president, Planning and Budgeting, along with literature searches. Current concepts of management and resource utilization were thoroughly investigated including TQM (Total Quality Management), CQI (Continuous Quality Improvement), Succession Planning and organizational review processes. It is the opinion of the committee that any of these plans, while potentially beneficial to the university, would have to be initiated at the upper administrative levels rather than by Administrative Staff Council in order to be effective.

However, the ASC Professional Development Committee is convinced that new visions of human resource management and professional development are imperative. Therefore, the ASC Professional Development Committee urges full participation in President Olscamp's plan to evaluate all non-academic positions and functions especially since Administrative Staff Council and the administrative staff as a whole are well represented on the committee. In this context we hope discussions will lead to examination of staff assignments, training and leadership development and the possible establishment of an ongoing organizational review program/succession planning.
Policy Statement on Succession Planning/Organizational Review Process

Administrative staff are committed to the betterment of Bowling Green State University. Maximizing each person as a human resource is important to the ongoing mission of the institution. The question is how to best achieve this. It is the opinion of the ASC Professional Development Committee that succession planning and organizational review processes are ways to insure ongoing professional development of administrative staff and create career paths for individuals that would benefit both the person and the university.

However, it is also the opinion of the committee that either of these plans would have to be initiated at the upper administrative levels rather than by Administrative Staff in order to work. Rather than continue to develop an organizational review process or succession plan in vain, the Professional Development Committee would like to recommend a policy to be adopted by Administrative Staff and forwarded to Administrative Council for approval.
Professional Development Committee
Administrative Staff Council

Notes from Succession Planning meeting with Jim Severs, 10/9/92

Jim Severs did not have positive opinion of Succession Planning. He indicated that it tends to become an event rather than a process.

He advocates an organizational review process. This is a down up process. Each manager meets with each employee several times each year.

Discussion - topics at these meetings would include:
1. Strengths
2. Weaknesses
3. Career Plans - where employee wants to go in five years, ten years.
4. Discuss how to get there - maybe not at same place of employment

Result - A series of action plans that everyone can follow

End of year evaluations should include
- Discussion of things each employee values
- Perhaps this could be included in evaluation & reward system.

Read about Total Quality Management
Philip Crosby's book - Quality is Free
Succession Planning Notes From Meeting with Jim Severs

Start in one area of human resource function

Identify specific positions and define the needs of those positions in 3 years, five years.

Concerns - retention, morale, is there a future at BG.

Succession planning does not address these concerns. It is treated as a yearly event of updating the organizational chart and then set aside until the next year.

Need to view the process as an organizational initiative from the bottom up.

This should be a dynamic everyday process.

Charge management not to come up with a succession plan, but a development plan for everyone based on the potential and the individuals desire.

- Need personal assessment from the individual. (What do you want?) and then how can we get you from here to there, or - Say I don't think the university sees you in that capacity.

- From the organizational perspective try to get the right people to do the right things.

Individuals want the right job based on skills and interests.

The supervisor asks what a person wants to be.

The upper administration evaluates performance, credentials etc.

An organization review process takes place one time a quarter.

The management sits in a room and talks about every person in the population then input is what a person wants - then management tries to come up with next job, not necessarily put a person into a position.

Managers should spend all the time thinking about people and performance.

Out t of the review comes the next step. Whatever the conclusion is must be told to the person. This will help in morale recruitment and retention -quarterly organizational review.

The immediate supervisor does the performance evaluation.

The supervisor's supervisor does the assessment for the future.

The payoff is greater retention of key people (we love you and you have a future) or if a person is at the bottom of the heap and there is a problem it is an opportunity to find a new heap. Give people a challenge so they are not locked into a certain strata. Opportunity for growth and professional development.

Organizational effectiveness - recognize there will never be any more administrative staff- will have fewer-demand go up and resources go down - need to get more out of human resources now. It makes sense to have the right people doing the right jobs.

The right people do the best to forge career according to organization needs.

Institution does not think human resources are important.
Communicate what we want to do and why it is important.

Here are the issues and here is a way to deal with the problems.

What are the payoffs for upper administration? Effectiveness - demands up resources are down - need best developed resources - find out what turnover costs - what does recruiting cost - get statistics from John Moore.

We have effective people here - focus on intangibles other than money - what does an employee value - talk about personal issues.

There should be 5 quarterly reviewers and the 5 vps share data - need coordinator to keep track of any plans.

Example - start with university affairs VP and directors and coordinator - member of ASC committee or personnel person.

maybe start in student affairs.

Tie into TQM get everyone involved to serve the client - the employee.

Get info on TQM Hutchinson, Chris Dalton, Bob Martin.

It appears to staff you don't have a high regard - get more staff benefit from fewer resources.
March 30, 1993

Memorandum

To: Members of ASC Professional Development Committee
From: Pat Green
RE: Succession planning

I met with the ASC executive committee and presented our recommendation on succession planning. The committee would like to keep the issue of succession planning alive and continue to put some pressure on to develop and implement such a plan.

Several options were discussed. A succession plan could be developed by an ad hoc committee because of the enormous time commitment involved. A variation of the plan could be created to consider as handbook changes. I agreed to meet with John Moore for additional information and discuss possible ways to proceed.

As a result of my meeting with John, we agreed that a letter would be sent to President Olscamp providing some information about a succession plan and requiring answers to specific questions from him. We need to determine if he agrees with the concept, wants more information about the details of such a plan, thinks it should be developed by us etc. In light of the reply to that memo, we can decide on a course of action.

I have enclosed a draft of information from John Moore that he suggests we use as we like. If you are so inclined (and I hope you are!) I would like you to draft some suggestions for the memo to the president while I am gone. Then I propose we get together as a committee on Monday, April 19 at our regular time and place (if Diane would take care of that) and talk about the memo. I will assume responsibility for final version of the memo.

Please call the Center office and let Alita know if the meeting date is good for you. In the meantime, behave and make sure the university doesn't fall apart in my absence. (joke!) I will think of you all while I am in Florida.

cc: Ann Bowers
Recommendation on Succession Planning
ASC Professional Development Committee

Administrative staff members are committed to Bowling Green State University. Maximizing each person's potential as a human resource is important to the ongoing mission of this institution.

Since 1991, the Administrative Staff Professional Development Committee has actively explored the question of maximizing employee resources by reviewing innovative quality improvement approaches. This lengthy review process included consultations with Jim Severs (Columbus-based management consultant), John Moore, executive director, Personnel Services, and Christopher Dalton, vice president, Planning and Budgeting, along with a review of the literature. Current concepts of management and resource utilization were thoroughly investigated including TQM (Total Quality Management), CQI (Continuous Quality Improvement), Succession Planning and organizational review programs. It is the opinion of the committee that any of these plans, while potentially beneficial to the university, would have to be initiated at the upper administrative levels rather than by Administrative Staff Council in order to be achieved.

However, the ASC Professional Development Committee is convinced that new visions of human resource management and professional development are imperative. Therefore, the ASC Professional Development Committee urges full participation in President Olscamp's plan to evaluate all non-academic positions and functions especially since Administrative Staff Council and the administrative staff as a whole are well represented on the committee. The Professional Development Committee anticipates discussions will lead to examination of staff assignments, training and leadership development and the possible establishment of an ongoing organizational review program and/or succession planning.
Diversity Endorsement

The ASC Professional Development Committee recommends that Administrative Staff Council endorses diversity education for BGSU staff. It is furthermore recommended that ASC lends full support for programs coordinated by Personnel Services and Affirmative Action office.
April 29, 1993

MEMORANDUM

TO: Ann Bowers, Chair Administrative Staff Council
    Greg Jordan, Chair-Elect, Administrative Staff Council
    Pat Green, ASC Professional Development Committee

FROM: Paul J. Olscamp
      President

Many thanks for your report on the work of the ASC Professional Development Committee in connection with the concept of succession planning for administrative staff members at the University. I agree that succession planning is an important part of the Administrative Staff Council's responsibilities, and I applaud it. It is also important to keep in mind that the University must bring in new talent from outside from time to time to refresh our thinking, and to give us new visions for the future. I do not think this is inconsistent at all with what you are doing, and I look forward to the recommendations of your committee.

Best wishes.
Memorandum

To: Paul J. Olscamp
    President

From: Ann Bowers, Chair
      Administrative Staff Council

Greg Jordan, Chair-Elect
Administrative Staff Council

Pat Green, Chair
ASC Professional Development Committee

For two years the ASC Professional Development Committee has been exploring the concept of succession planning for administrative staff members at Bowling Green. At this time we would like to update you on our progress.

A succession plan identifies employees who are talented, have transferable skills and are ready to be groomed for a particular position within the university. Once identified, the person is encouraged to acquire additional skills necessary for promotion through appropriate professional development activities. The results are a win-win situation. The employee feels valued by the university, and the university has a qualified person to step into a particular position or compete in an applicant pool.

The Professional Development Committee has taken the following steps in the past two years:

- Worked closely with John Moore in Personnel Services in examining approaches to succession planning.
- Distributed survey to top three levels of administration to determine level of support for succession planning at BGSU (65% of the surveys were returned with a high level of approval for the plan.)
- Met with Marshall Rose to discuss succession planning in relation to affirmative action goals (Marshall endorsed succession planning as consistent and helpful to affirmative action guidelines.)
- Met with Jim Severs, a BGSU alumnus and human resources consultant from Columbus, to discuss Succession Planning and organizational review plans as they might apply to a university setting.
- Met with Chris Dalton to discuss Total Quality Management in higher education (There are some aspects of TQM that overlap with succession planning.)
- Explored current concepts of Total Quality Management, Continuous Quality Improvement, Succession Planning and organizational review processes by conducting extensive literature searches.

As a result of the work of the committee, it is apparent that in times of reduced resources and on-going changes an organizational review process/succession plan would be of great benefit to Bowling Green. The development and approval of a plan are the next steps to be taken by Administrative Staff Council. It has been recommended by the Professional Development Committee that an ad hoc committee be established and charged with this goal for 1993-94.

If you have any questions, comments, or feedback, we would welcome them as we move forward.

cc: John Moore
    Ad Council Members