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What if you don't have the data? Acquiring and exploring data to initiate government programs

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Abstract

Succession planning has virtually always been an activity performed in for-profit companies. However, that is changing more and more to include governmental organizations. But questions remain with regard to how succession planning in such organizations should be conducted; and, how such succession planning efforts should be evaluated. For example, in for-profit companies, succession planning is typically focused on addressing problems such as increasing profits. The fact is that governmental organizations also need revenue streams, but not in the same sense as for-profit companies. And beyond revenue, what other factors should be included in succession planning in governmental organizations. This research sought to develop a set of indicators for succession planning in governmental organizations. And, because formal succession planning in these organizations is still a relatively new activity concepts regarding the data required to develop the set of indicators also had to be developed. That is, in a very real sense this research addressed the problem of what to do if data is not readily available.

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1. Introduction and Background

Popular literature unanimously supports the notion that succession planning is important, even critical to organizations. It has a plethora of articles discussing a wide range of related issues including the need for organizations to pay greater attention to succession planning citing statistics indicating two of every five new CEO's will fail in their first 18 months. However, specific measures of the actual value, or impact, of succession planning to organizations are not to be found. How important is succession planning to an organization? The assertion is that poor succession planning typically leads to poor performance, so it is very important. This is easy to understand in the context of for-profit organizations. But public organizations and/or government agencies are non- or not-for-profit organizations. Performance issues such as developing and maintaining competitive advantage in these types of organizations is less clear. This research seeks to define what succession planning is or means, and then begins to measure its impact on organizations, specifically on public (governmental) organizations. In order to measure the impact of succession planning on an organization, a set of indicators used to make such measurements had to be developed first.

To develop a formal, systematic and deliberate process one of the first challenges is to establish a set of metrics, or indicators. That is, a set of indicators that can be used to measure and evaluate the impact of succession planning on organizations in the context of changing leadership (succession). This research developed such a set of indicators by focusing on the question,

How is succession planning important to an organization?

This primary research question led to a range of related questions used to probe key employees, i.e. existing leaders in four governmental organizations in order to develop concepts required to acquire the data needed for a set of indicators. As developed through a comprehensive literature review, the entire set of related questions included:

- Is Succession planning important?
- Is Succession planning important to identify new leaders?
- Is Succession planning important to developing new leaders (for example, do career developments paths exist and are they used to identify new leaders?).
- Is Succession planning important to financial success (for example, is there variation in financial indicators as leadership changes? e.g. within the budget?).
- Is Succession planning important to foster positive organizational culture (for example, what effect does executive turnover have on morale?).
- Is Succession planning important to long-term viability (for example, what effect does executive turnovers have on the turnover of other key employees?).
- Is Succession planning important to sustaining core competencies?
- Is Succession planning important to maintaining competitive advantage?
- Is Succession planning important to initiate change management?

Although the results of this research were developed to be general in nature, appropriate care should be taken in applying them to types of organizations, other than governmental agencies.

1.1. The 'Old' View of Succession Planning

In the past succession planning has only been concerned with the selection of certain individuals to fill executive positions, such as top leaders and business owners in large organizations (Williams, 2005). And, even though succession planning is not a novel idea, many companies and organizations still apply succession planning only for the most senior ranks such as CEO's. The organizational hierarchy rather than any real vacancy needs may influence the process (Coulson, 2003).