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Succession Planning in Higher Education Institutions

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Overview

- What is Succession Planning?
- Allocating TREADs
- Assessing Your Bench Strength
- Identifying Employee Competencies
- Assessing Your Organization's Brand Reputation
- Summary and Reflection

What is Succession Planning?

- A. Picking a back-up person **Replacement planning**
- B. A senior leader exercise **Too narrow**
- C. A one-time HR document **Done once, then forgotten**
- D. About who leaves **Reactionary process; too late**
- E. Talent hoarding or favoritism **Causes avoidance or secrecy**
- F. All of the above

What is Succession Planning?

Succession planning ensures the organization always has the **leadership**, **skills**, and **knowledge** it needs, no matter who comes or goes.

(Berger & Berger, 2018)

What is Succession Planning?

- **Retention** strategy
- **Leadership development** strategy
- **Prevents leadership vacuums**
- **Risk management** practice
- **Stewardship** of an institution
- Ensures programs and people **thrive**, regardless of change

(Berger & Berger, 2018)

What is Succession Planning...in Higher Education?

“As far as I can tell, higher ed has virtually no tradition of succession planning.”

“The lack of attention to leadership succession is an outgrowth of higher ed’s tendency to prioritize participation over outcomes.”

(Rosenberg, 2024)



TREADs Allocation

TREADs

- **Training**
- **Rewards**
- **Education**
- **Assignments**
- **Development**

Allocated based on employees' current and potential contribution to organizational success.

(Berger & Berger, 2018)

TREADs

Evaluate talent systematically and consistently across the organization through formal, structured discussions.

- Identify high-potential, high-performing employees
- Assess readiness for advancement
- Surface future leaders early

(Berger & Berger, 2018)

Allocating TREADs

Categories	Characteristics	Compensation	Training/Development	Career Paths	Visibility
Super-Keepers top 3%	Greatly Exceed Expectations Role Models	Accelerate much faster than market	Major investments	Very rapid	Very high recognition
Keepers next 20%	Routinely Exceed Expectations Role Models	Accelerate faster than market	Substantial investments	Rapid	High recognition
Solid Citizens next 75%	Meet Expectations	Accelerate moderately	Enhance competencies	Moderate to none	Recognition
Misfits bottom 2%	Do Not Meet Expectations	No increase	Only to improve fit	None	

(Berger & Berger, 2018)

Allocating TREADs

CMU Libraries (44)

Categories	CMU LIB
Super-Keepers top 3%	2
Keepers next 20%	9
Solid Citizens next 75%	33
Misfits bottom 2%	1

Allocating TREADs

CMU Libraries (44)

	Employees	Compensation	Training / Development	Career Paths	Visibility
Super Keepers (2)	2 managers	Revise / expand job description. Conduct salary review. Offer temporary assignments with additional compensation.	Attend state or national library leadership training program. Attend national conferences. Stretch assignments.	Promote 1 or 2 levels within next 5-10 years.	Have been promoted at least once already. Chair library and serve on and university committees. Encourage service and leadership on state or national library committees.

Allocating TREADs

CMU Libraries (44)

	Employees	Compensation	Training / Development	Career Paths	Visibility
Keepers (9)	Managers Librarians Staff	Revise / expand job description. Conduct salary review.	Attend external workshops. Encourage earning a master's degree. Stretch assignments.	Promote 1 level within next 5 years.	Serve on at least one library committee. Encourage chairing library committees or serving on university committees.



Bench Strength Assessment

Bench Strength Assessment

Evaluate whether the organization **has enough capable, prepared talent to fill critical roles** now and in the future.

- Identify succession **risks** for key positions
- Reveal **gaps** where there are too few ready-now or ready-soon candidates
- **Reduce crises** due to unexpected departures
- Inform strategies for development, retention, or hiring

(Berger & Berger, 2018)

Bench Strength Assessment

Potential	Performance	Next Position	Status	Replacements
Unlimited Potential	Greatly Exceeds Expectations	Title	Now	Void (positions with no internal replacements)
Promotable 1-2 levels	Exceeds Expectations	Title	1-2 years	Surplus (positions with more than one potential replacement)
Lateral	Meets Expectations	Title	3-5 years	Blocking (non-promotable managers with promotable direct reports)
No Potential	Below Expectations		Uncertain	

(Berger & Berger, 2018)

Bench Strength – CMU Libraries

Key Position	Potential	Performance	Next Position	Status	Replacements
Dean	Lateral	Exceeds expectations	Retirement	3-5 years	Void
Associate Dean	Promotable 1 level; Lateral	Exceeds expectations	Interim Dean Retirement	3-5 years	Surplus
Director of the Clarke Historical Library	Promotable 1 level; Lateral	Exceeds expectations	Retirement	1-3 years	Void

Bench Strength – CMU Libraries

Key Position	Potential	Performance	Next Position	Status	Replacements
Manager of Access & User Services	Promotable 1-2 levels; Lateral	Exceeds expectations	Associate Dean Dean	3-5 years 10 years	Void
Manager of Library Systems	Promotable 1 level; Lateral	Exceeds expectations	Associate Dean	Now	Void



Competencies

Competencies

Competencies establish a clear, shared definition of **what success looks like** in the organization.

(Berger & Berger, 2018)

Competencies

- Grounded in **mission** and strategy
- Describe the **culture** you want
- Clarify **expectations**
- Make informal/unspoken **rules explicit**

(Berger & Berger, 2018)

Competencies

Competencies align people practices with business goals and are integrated in processes:

- Hiring and selection
- Performance management
- Training and development
- Succession planning

(Berger & Berger, 2018)

CMU's Expectations

Leadership Standards (CMU, Office of the President, n.d.)

- Team builders
- Thoughtful, Open Communicators
- Service-Oriented
- Proactive, Responsible and Accountable
- Courageous and Effective
- Focused on Students and Passionate about CMU

Service Excellence Values (CMU, Human Resources, n.d.)

- Care
- Knowledge
- Availability
- Follow-through

Library Professional Standards

ALA Code of Ethics (ALA, 2021)

- Highest level of service to all library users
- Appropriate and usefully organized resources
- Intellectual freedom
- Right to privacy and confidentiality
- Treat colleagues with respect
- Maintaining and enhancing skills and knowledge
- Affirm dignity and rights of every person

ACRL Standards (ACRL, 2018)

- Contribute to institutional effectiveness
- Advance professional values of intellectual freedom, intellectual property rights and values, user privacy and confidentiality, collaboration, and user-centered service
- Develop and support information-literate learners
- Enable users to discover information in all formats through effective use of technology and organization of knowledge
- Provide access to collections sufficient in quality, depth, diversity, format, and currency
- Provide safe, secure, and easily navigated physical and virtual spaces
- Provide sufficient number and quality of personnel
- Advocate, educate, and promote their value to internal and external stakeholders

CMU UL Competencies

CMU UL Core Competencies

Attributes

Service-Oriented and Welcoming

Meet if not exceed the expectations of library visitors. Be available, care, and follow through. Build effective relationships and deliver high quality services.

Client-Centered

Make student-centered decisions and design the library's spaces, services, and resources to support student success. Center the needs of learners, researchers, and community members.

Accessible

Apply universal design principles to our spaces and communications. Be available and approachable.

Curating Accessible and Discoverable Collections

Provide library collections that support the instructional programs of the university, support the research requirements of faculty and students, and that offer a variety of perspectives to support the educational endeavors of the CMU community and the intellectual growth of its users.

CMU UL Competencies

CMU UL Core Competencies

Attributes

Creative and Innovative

Clearly define opportunities and challenges; utilize brainstorming and ideation techniques to explore possibilities; evaluate and prioritize options. Take reasonable risks, practice continuous improvement, and foster iterative and universal design.

Collaborative

Demonstrate respectful interpersonal and emotional intelligence skills; communicate clearly and in a timely manner; demonstrate effective meeting practices; demonstrate effective conflict resolution practices; be solution oriented.

Responsible and Sustainable

Steward institutional resources effectively and efficiently in alignment with CMU's vision, mission, and strategic priorities.

(ALA, 2021; ACRL, 2018; CMU, HR, n.d.; CMU, Office of the President, n.d.; CMU, University Libraries, 2018)



Brand Reputation

Brand Reputation

Employer Brand

An organization's reputation / perception as an employer.

Talent Value Proposition

The primary attributes that distinguish an employer for current and potential employees.

(Berger & Berger, 2018)

Brand Reputation

- **Retain** top performers by aligning promises and reality
- Identify and resolve **gaps** between the employee value proposition and lived experiences
- **Attract** high-quality candidates aligned with the culture
- **Compete** more effectively for scarce or high-demand talent

(Berger & Berger, 2018)

Brand Attributes - EARs

Essential for brand strategy	Attractive to employees	Realistic based on current practices
Crucial	Crucial	Close to reality
Important	Important	Short stretch
Low	Low	Long stretch

(Berger & Berger, 2018)

Brand Attributes - CMU	Essential?	Attractive?	Realistic?
Leadership Standards			
• Team Builders	Crucial	Important	Short stretch
• Thoughtful, Open Communicators	Crucial	Important	Close to reality
• Service-Oriented	Crucial	Important	Close to reality
• Proactive, Responsible, and Accountable	Crucial	Important	Close to reality
• Courageous and Effective	Crucial	Important	Short stretch
• Focused on Students and Passionate about CMU	Crucial	Important	Close to reality
Service Excellence			
• Care	Crucial	Important	Close to reality
• Knowledge	Crucial	Important	Close to reality
• Availability	Crucial	Important	Close to reality
• Follow Through	Crucial	Important	Close to reality

Brand SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Financials • Employee Medical, Retirement and Tuition Benefits • Campus • Accessibility • Leadership Standards • Employee Value Proposition 	<p>Opportunities</p> <ul style="list-style-type: none"> • Largest town in county • Top employer in county • Unemployment in county higher than in state
<p>Weaknesses</p> <ul style="list-style-type: none"> • Enrollment and impact on budget • Entry level wages • Aging infrastructure • Remote work policies/practices 	<p>Threats</p> <ul style="list-style-type: none"> • Recruiting employees from a distance • Average wages in county less than Midland, Ingham, or Kent counties

Competitive Analysis

Employer Brand Attributes	CMU	Competitor 1	Competitor 2	Labor Market
Leadership Standards	H	M	M	L
Service Excellence Values	H	M	M	M
Competitive Wages	L	H	M	M
Medical and Retirement Benefits	H	H	H	M
Tuition Benefit for Employees	H	M	M	L
Tuition Benefit for Family Members	H	L	M	L
Remote Work Policy	L	H	M	M
Employee Value Proposition	H	M	M	M



Summary & Reflection

Summary

Succession planning helps organizations

- Make talent decisions fairer, clearer, and more strategic
- Build a sustainable leadership pipeline
- Align culture, capability, and brand with long-term goals
- Treat talent as a competitive asset

(Berger & Berger, 2018)

Challenges

- Understanding the value of succession planning
- Following through with training and development
- Having sufficient resources to implement strategies
- Having career options for top talent

(Berger & Berger, 2018)

Reflection Questions

1. If you were suddenly unavailable for 3-6 months, who could step in confidently? What might stall?
2. What roles are essential to your mission? How are you helping people grow into them?
3. Identify an employee who could benefit from a stretch opportunity. What would help them grow?
4. Identify one emerging leader. Why are they seen as ready? What development do they need?
5. What is your organization's definition of leadership readiness?



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