



Succession Planning

Florida Education Negotiators

42nd Annual Conference

Embassy Suites – Lake Buena Vista

May 3, 2022

Agenda

- Introductions
- Couple of Stories
- What is “Succession Planning”?
 - Why do we need it?
 - When do we do it?
 - Where is it done?
 - How do we do it?
- What it is NOT?
- Six steps to help start succession planning
- Questions and discussion

Introductions

- Michael's Background
 - 30+ years experience in Florida K-12
 - Brevard (15 years), Indian River (almost 5 years) and St. Johns (since 2011)
- Experience in Succession Planning
 - Been doing it for years
 - One of eight founding members of the Institute for Florida School Finance (IFSF)
 - Hillsborough, Pasco, Columbia, Marion, Leon, Seminole, Nassau and St. Johns
- Disclaimer on Material Presented
 - Not an expert by any means
 - Based on opinion and experience

Couple of Stories

- Commerce Secretary Ron Brown
 - April 3, 1996 Plane Crash
 - He and 11 other Department of Commerce employees were killed
 - Devastating loss for the Department and the US Government
- Personal Stories:
 - Brevard
 - St. Johns

What is Succession Planning?

- It's a strategy for identifying and developing future leaders in your organization or department — at all levels. Not just the C-suite jobs.
- Used to address inevitable changes to staff composition
 - Resignations
 - Retirements
 - Terminations
 - Illnesses
 - Deaths
- Organizations need to be prepared for contingencies by identifying and training high potential employees for key roles
- Build your bench strength

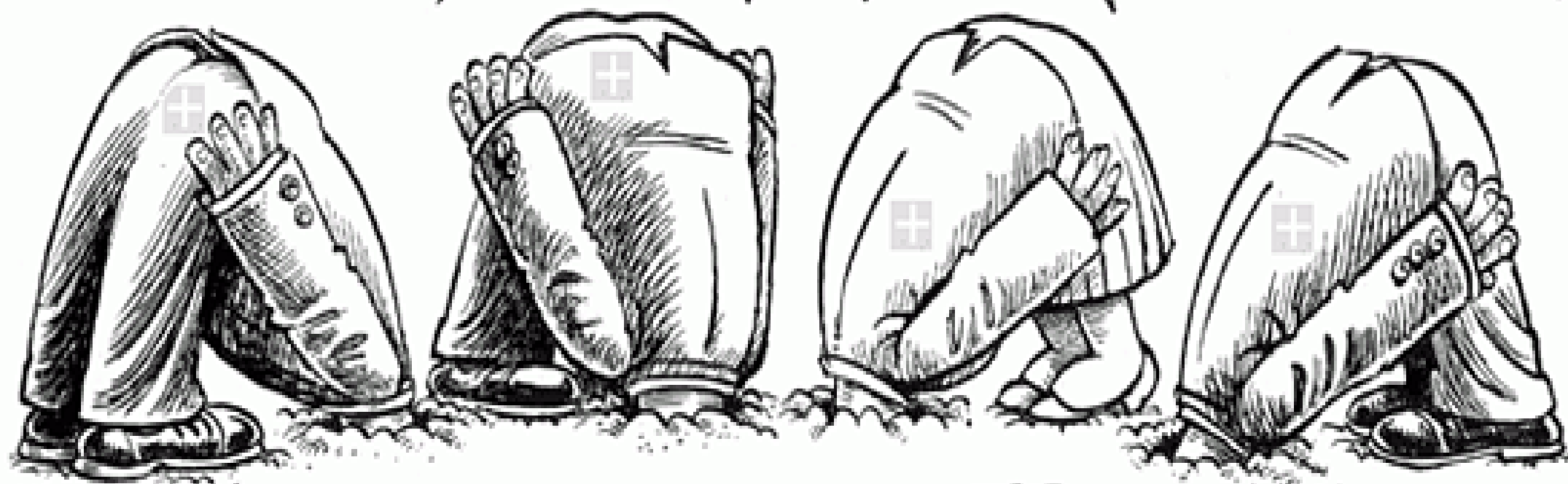
What is Succession Planning?

- Critical process that is often overlooked
- Something organizations need to do continually in order to run smoothly and to anticipate and facilitate the transfer of knowledge
- It is a “manageable event” and not a major organizational overhaul
- Ongoing process and not a “one and done” deal
- Used properly, it is the best method of cross-training employees in various functions

What Succession Planning is NOT?

- A one time event
- Decided by one person
- Reacting only when a position becomes vacant
- Line managers relying on their own knowledge and/or comfort with a candidate
- A promise of a job!

CRISIS ?..WHAT CRISIS?!



Six Steps to Help Start a Succession Planning Program

#1 - Know who you are as an organization

- Succession planning is not a one-size-fits-all process
 - St. Johns looks very different from other districts
 - My department looks different from your department
- There is no right or wrong way
 - Different types of organizations need different types of leadership
 - Schools vs. district departments

#2 – Look at your entire organization

- Assess your current workforce to identify key positions and key employees
- Recognize that key employees are not always “upper management”
- Do you have a program specialist who never met a problem she couldn't solve?
- Do you have an assistant principal that can analyze anything...and well?

#3 – Think of what your strategy should be

- Should it be for every position or just those key positions?
- Should you include identifying and preparing successors as an evaluation point for your managers?
- Where are your vulnerabilities?
 - DROP – look at the list often
 - Performance issues
- What do you want to accomplish?

#3 – Think of what your strategy should be

- The best plan is the one that fits your organization
- The plan needs to focus on what you can do proactively to transfer knowledge, provide professional development, mentors, etc.
- “I want to leave it in better shape than I got it”

#4 – Look to see who your Rock Stars are

- Look for two or three high performers to see if they would be a good fit in a key role
- Need to look at performance objectively and not emotionally
- Sometimes the strongest performers are also the most quiet employees
- Use vacations and other absences to test out someone's mettle

#5 – Take on difficult decisions and conversations

- Need to talk with potential recruits to see what they want
 - “Career Chats”
- Know that some who you think would make it on the next level just are not interested
- It not only identifies those who could/should get promoted in the future, it also identifies those who shouldn't -- at least for now

#6 – Growth does not always go up

- Expand your own definition of “growth”
 - They may not be ready and/or may not want it (yet)
- Grow and develop your staff laterally
- Employees need to feel valued
- Let them know that you support their own PD

#6 – Growth does not always go up

- They have a need for recognition
- NEVER underestimate the value of a slap on the back!!
- Expand their responsibilities to include:
 - training new or lesser experienced staff
 - attend more advanced training or different training
 - speak at a FEN conference
 - FOIL, FASA, FEPPA, FSFOA, FSBA, FELL, FAPT, FAME, FAMIS, FADIMA, FETC or FADSS

9-BOX PERFORMANCE/POTENTIAL GRID

POTENTIAL AXIS



LOW PERFORMER HIGH POTENTIAL	MODERATE PERFORMER HIGH POTENTIAL	HIGH PERFORMER HIGH POTENTIAL
LOW PERFORMER MODERATE POTENTIAL	MODERATE PERFORMER MODERATE POTENTIAL	HIGH PERFORMER MODERATE POTENTIAL
LOW PERFORMER LOW POTENTIAL	MODERATE PERFORMER LOW POTENTIAL	HIGH PERFORMER LOW POTENTIAL

PERFORMANCE AXIS



POTENTIAL

What is this person's ability to grow, learn, and improve in current and future roles?

STRONG

ADEQUATE

WEAK

7

COACHABLE

Weak performance, exceptional rate of growth

8

FUTURE STAR

Adequate performance, yet exceptional rate of growth

9

IRREPLACEABLE

Exceptional performance with strong future potential

4

POOR

Weak performance, improving moderately

5

SOLID

Adequate performance improving moderately

6

CURRENT STAR

Exceptional performance, improving moderately

1

UP OR OUT

Weak performer, little to no improvement

2

ACCEPTABLE

Adequate performance, not likely to grow much

3

PERFORMING

Exceptional performance, little to no improvement or potential for promotion

WEAK

ADEQUATE

STRONG

PERFORMANCE

How high-performing is this person in his/her current role?

McKinsey 9 box Talent Matrix

Potential

Enigma

Growth
Employee

Future
Leader

Dilemma

Core
Employee

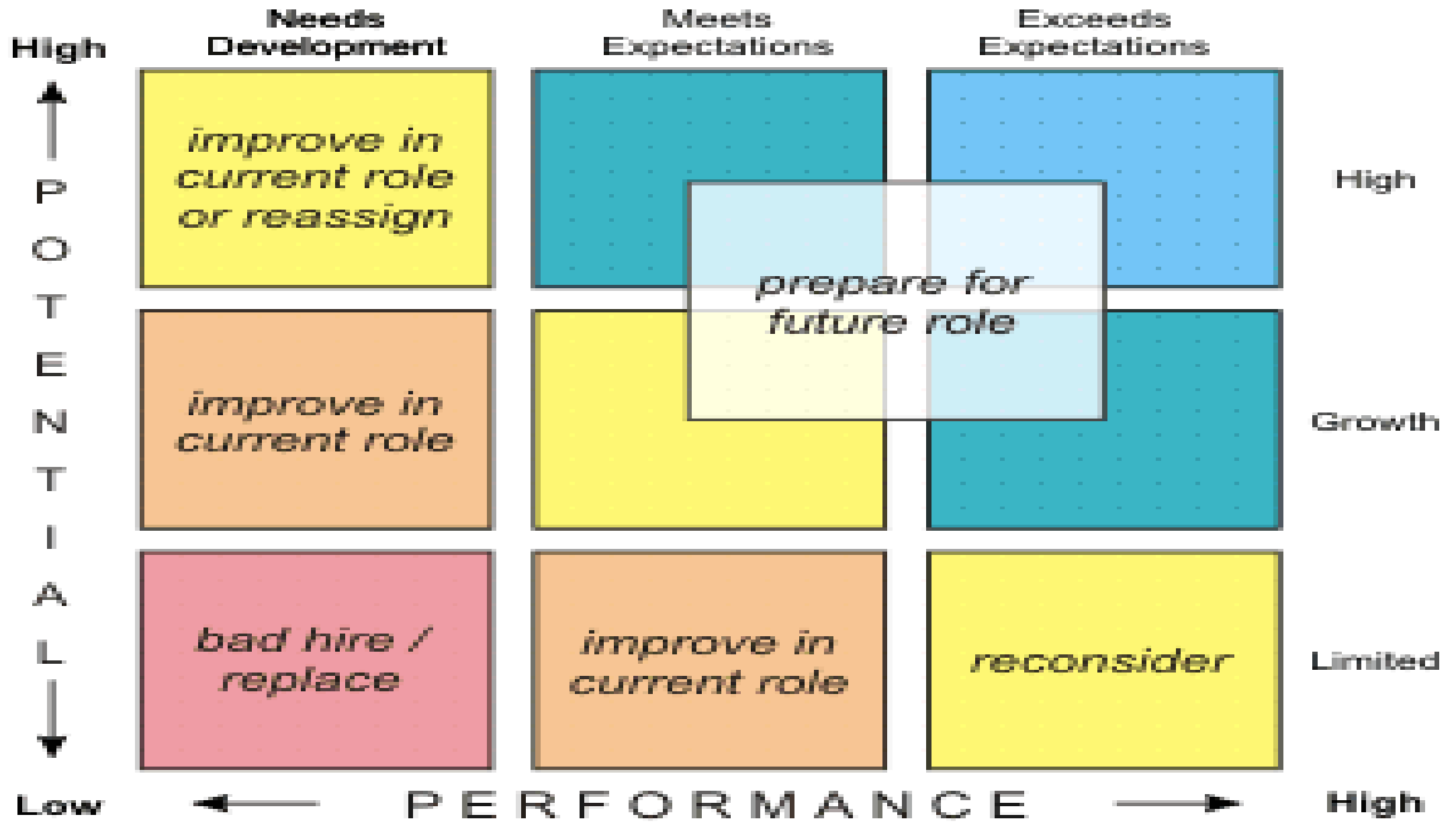
High
Impact
Performer

Under
Performer

Effective

Trusted
Professional

Performance



Let's talk about role changes...can we talk?

Contact Information

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Questions & Discussion

Thank You!