

Art, Science, and a Leap of Faith: Succession Planning in Catholic Education

At a recent conference with Catholic school leaders, the conversation, inevitably, led to the challenges of staffing and leadership development. Hearing about a process in place at the Lasallian District of San Francisco New Orleans, we invited Mike Daniels, Director of Education, to share his experience and wisdom.



On one of my first days as a new school president, the Board chairperson asked me, “Who will be your successor?” After 18 months as Development Director, my leadership journey now had me focused on gaining a better grasp of the expectations of president. I was already struggling with how to integrate unfamiliar duties into my vocational commitment *and now I was responsible for finding my successor, too?*

I respected and trusted the chairperson’s perspective and experience, yet I was surprised to already feel the pressure to know how to “turn over the keys” to a new leader. What I came to recognize was that, while it was the Board’s role to hire my successor, it was my responsibility to prepare the way for her or him. With the support of the chairperson, I would commit myself to cultivating leadership throughout the school for as long as I served as president.

Succession planning in Catholic schools is an art and a science and, when done well, is developed in relationship with trusted individuals who always keep the needs of students at the forefront. This collective trust empowers prospective leaders to take the necessary leap of faith to accept God’s call to participate in God’s Kingdom through servant leadership.

Benefits

An effective succession plan helps develop and select the right people for leadership roles. According to Gallup, companies fail to choose the candidate with the right talent for the job 82% of the time. A well-conducted search will often result in a great find, but a homegrown team member has already proved his/her worth. Other benefits include lower hiring costs, shorter vacancies for key positions, enhanced career development, increased employee engagement, accelerated onboarding, higher performance, and heightened employee retention.

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Key Elements

Essential approaches that guide effective succession planning include

- student-centered decision-making,
- knowledge of the Catholic educational mission, and
- authentic understanding of the needs of the community being served.

Succession planning is a communal responsibility, with accountability, commitment, and transparency present on the highest levels of organizational leadership. **Proactive, responsive succession planning engenders shared concern for the mission and sustainability of schools in our Catholic educational landscape.**

Now serving as Director of Education for the Lasallian District of San Francisco New Orleans, I accompany our 18 high schools, three elementary/middle schools, and one institution of higher education, mainly advising and supporting the leadership of our Boards, presidents, and principals in the areas of mission and governance.

As Director of Education, I have supported the transitions of 59 chief administrators in our District's schools. On average, we experience a 20–25% annual turnover rate among our presidents and principals.

According to a recent study from The Wallace Foundation (Egalite, Grissom and Lindsay, 2021), today's school principal has significantly less experience in the role than three decades ago, as they remain in their positions for less time. **The study also found that this decline in leadership experience is most pronounced in schools serving high-poverty populations.**

Given the reality of teacher and administrator shortages and contemporary turnover in faculty/staff, it is imperative that schools devote the time, resources, and expertise needed to grow from within. With the exception of a crisis, no longstanding principal or president should plan to depart without a thorough timeline for succession, or at least potential successors in place. Any school whose leadership is nearing retirement age is advised to examine the potential of existing staff and provide ample training and professional development to further prepare them for a step up in responsibility.

It is, in fact, a moral obligation to the school's mission that the administrative and board leadership consider succession planning a top priority. **Turning this from good intention to best practice, however, starts well before the succession plan is written and calls for a level of collaborative engagement that can only emerge with a commitment to distributed leadership.**



About the author ...



Michael "Mike" Daniels, E.D. is in his seventh year as Director of the Office of Education for the Lasallian District of San Francisco New Orleans. As Director, Mike leads the eleven-person Office of Education team, providing professional accompaniment and mission formation to Boards, administrators, teachers and students of 22 De La Salle Christian Brothers-sponsored schools located in eight states. He also serves on the District's Leadership Team, which assists in overseeing District operations. In addition, Mike currently serves as a Trustee for the Lasallian Education Corporation of California and the Lasallian Education Council of Washington, DC, and as a Trustee for several Lasallian schools in the San Francisco Bay Area.

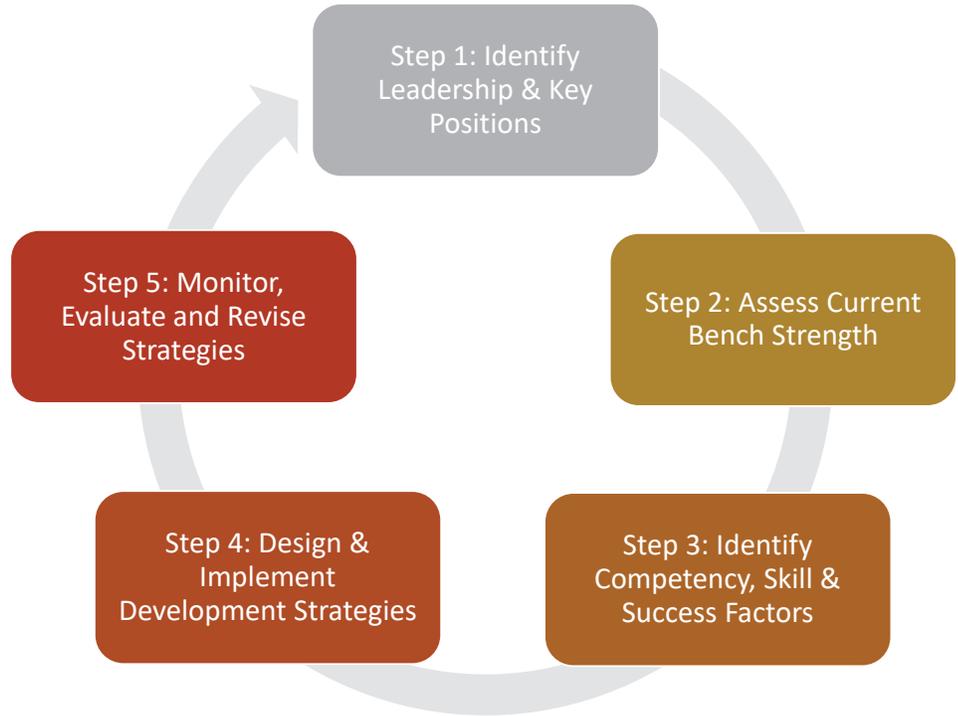
Mike holds a B.A. in History and Education from Saint Joseph's University, and an M.A. in Theology and a Doctorate of Education (Ed.D.) in Catholic Educational Leadership from the University of San Francisco. He has received Sacred Heart Cathedral Preparatory's Vincentian Award, Christian Brothers Conference's Distinguished Lasallian Educator Award, and Saint Joseph's University's Ignatius Alumni Service Award.

Distributed Leadership

Distributed leadership is essential to effective succession planning. Preparing current and future generations of school leaders is a shared responsibility. Schools that thrive during executive transitions often do so because of the competence, talents, and capabilities of the team that surrounds and supports school leadership. Anxieties and questions amid organizational change can be addressed effectively when a high level of trust exists among the various levels of school leadership: Boards, administration and faculty/staff, student, parent, alumni, and benefactor leaders.

Like most everything in the world of Catholic education, it all starts with, and returns to, mission. Effective schools will invest time and expertise in formation for mission with all members of a faculty and staff and more so at the administrative level. *Training for mission comprehension and community-building are necessary for teams to build the inner strength required to cultivate talent for future leadership and feel comfortable stepping up when the time comes (and sometimes, before it is expected).*

All members of a school community benefit from formation experiences through the lenses of charism, culture, and communal discernment. Such experiences, provided by dioceses, religious congregations or the schools themselves, support and encourage distributed leadership for mission. *This formation also elevates the role of school administrators and often results in not only lengthier leadership tenures but also overall satisfaction in the position.*



Start with Math

We often mention that our schools are data driven, but sometimes we ignore the simple math of who’s who and what’s next. A succession planning process to identify, prepare, and develop the next generation of leadership and key positions can ensure continuity and sustainability. *The retirement of a chief administrator who has served 30 years and is age 65 should be a surprise to no one.* A simple form designating each department’s organization chart with notations regarding years of service and likelihood of departure (1–3, 3–5, 5–7) can be updated annually.

It can be awkward to have a conversation about the future with a long-term employee if it has never happened before. Thus, the annual review of intentions and plans can help prepare for the future. Once established as a regular practice, faculty and staff will start to think beyond “this year” as a matter of habit. It also helps to take note of what employees are sharing. Enthusiastic news about an expected first child or grandchild builds community and can also prompt conversations about if/how that will impact future employment.

Sample Bench Strength Assessment Form

Position Title	Incumbent Name	Position Impact (high, medium, low)	Retirement Status (A, B, C)*	Vacancy Risk (high, medium, low)**	Criticality (1,2)***	Number of Staff Ready Now	Number of Staff Ready in 1-2 Years	Succession Planning Priority (Yes/No)

* **Retirement Status:** A. Retirement likely within 1 year B. Retirement likely within 3 years C. Retirement likely within 5 years
 ** **Vacancy Risk:** Based on factors such as the incumbent’s retirement eligibility, marketability, etc.
 *** **Criticality:** 1. Critical - Must hit the ground running 2. Very Important - Fully functional in six months

With this information in hand, the school administration can make better decisions about specific employees and what professional development, mentoring, and support they deserve if they are to move forward in their careers. A primary goal of succession planning is to identify potential leaders and high performers, prepare them in advance of promotion, and ensure that schools are effectively managing their talent pipelines. All of these elements contribute toward higher performing schools to best serve and form students, the ultimate goal of Catholic education.

Without succession planning as a priority, the school risks the loss of critical knowledge, successors who are ill prepared, lost time getting a successor up to speed, disruptions to school operations, and diminished morale.

Of course all the planning in the world won't prohibit unexpected and immediate changes due to circumstances outside the control of the school and the individual involved.

Emergency Succession Planning

Our Lasallian District schools' presidents are expected to present a plan at the start of each school year that identifies up to two potential internal successors in the event of the need for an emergency succession. These individuals identify as willing to serve as Acting President, and the plan outlines expectations in the areas of oversight, communications, potential compensation increases, and other short-term, long-term, and permanent transition considerations.

Emergency Succession Plan

The Board of Trustees of St. Cecelia School recognizes that this is a plan for contingencies due to the disability, death or departure of the President. If the organization is faced with the unlikely event of an untimely vacancy, St. Cecelia has in place the following emergency succession plan to facilitate the transition to both interim and longer-term leadership.

The Board annually reviews the job description of the President. The job description is attached. The Board has a clear understanding of the President's role in the School's leadership team. The Board also understands the President's role in the financial development and educational programs of the school.

Acting President

At the time that this plan was approved, the position of Acting President would be: NAME/TITLE. Should the standing appointee to the position of Acting President be unable to serve, the back-up appointee for the position of Acting President would be: NAME/TITLE.

If this acting President is new to his/her position and fairly inexperienced with NAME OF SCHOOL, the Board may decide to appoint the back-up appointee to the Acting President position. The Board may also consider the option of splitting Acting President duties among the designated appointees.

Documentation includes...

- Signatory page,
- President's job description,
- outline and timeline of steps,
- organizational chart, and
- confidential organizational information such as finances, accounts, and physical plant operations.

Ideally, such a plan should also be in place for the Principal, CFO, and VP for Advancement.

Board approval is required for the plan. It is a vital tool for school boards and leadership should the need for emergency succession arise, and I have experienced its effective utilization on several occasions.

If succession planning is not already in place at your school, perhaps begin with an emergency plan as described above. If the answer to the question "Who can step up?" is met with silence, it will drive home the need to address this question in a comprehensive manner.

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Return to Mission

Successful leadership succession in Catholic schools benefits all whose hearts and minds are touched by Catholic education. For this to happen, processes and decisions must be student centered and authentic to mission while also cultivating confidence and trust.

Leadership in modern Catholic education can be a lonely and demanding experience, given high public expectations, 21st century Catholic educational landscape complexities, and today's social divisiveness. Promoting healthy and sustainable schools requires courage, commitment, and clarity of mission.

I am privileged to partner with dynamic and dedicated mission-centered Catholic school leaders who strive to meet educators and students where they are in regard to their needs. The importance of supporting seamless transitions for these grace-filled leaders cannot be overstated. School communities desire it, and, most importantly, students deserve it.

Acknowledging Jesus Christ as the exemplar servant leader and capacity builder, I recommend ensuring systems and cultures of distributed leadership across Catholic school settings; supporting practices of reflection, prayer, empathy, and self-awareness; cultivating communities of support that embody the blessings and joys of school leadership; equipping our current and future

Why is Succession Planning Important?

- Schools desire seamless leadership transitions.
- Students deserve it. Period.



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leaders with the faith-filled discipline to sustain themselves and their school communities through a healthy integration of vocational commitments; and clearly defined search processes with delineated roles and responsibilities supporting succession at the right time. With humble

appreciation for the gift of Catholic education, and in recognition of the reward of a sense of belonging and purpose in our Catholic Church, I believe this will position us well to support effective leadership succession across our elementary and secondary Catholic schools.

References

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Grissom, Jason A., Anna J. Egalite, and Constance A. Lindsay. 2021. "How Principals Affect Students and Schools: A Systematic Synthesis of Two Decades of Research." New York: The Wallace Foundation. Available at <https://www.wallacefoundation.org/principalsynthesis>



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