Pearl Meyer

Building the Leadership Pipeline

Evaluating Talent and Strengthening Internal Succession in Higher Education

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The premise

Good succession planning buys the institution time, information, and options.

Leadership transitions cannot be avoided. The question is whether the institution confronts them deliberately — or reacts after the options have narrowed.

Time

to prepare leaders before a vacancy exists

Information

to know whether potential successors are genuinely ready

Options

to choose among credible paths rather than one forced path

Assessment is the mechanism that turns succession from aspiration into judgment.

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Leadership transitions create strategic risk

A change at the top is rarely just a personnel event.

A transition can interrupt:

- **Strategic momentum**
- **Donor and stakeholder confidence**
- **Institutional memory**
- **Senior team stability**
- **Board focus and credibility**

The risk is not that leadership changes.
The risk is that the institution must make a consequential decision without enough preparation.

Research on CEO succession finds short-term disruption effects and links long-term outcomes to strategic change and successor origin.

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Deliberate succession preserves control

The difference is how many choices the institution still has when leadership changes.

Reactive succession

- Vacancy
- Urgency
- Search
- Choice
- Transition

Reactive planning asks: “Who can we get now?”

Deliberate succession

- Future needs
- Assessment
- Development
- Alternatives
- Transition

Deliberate planning asks: “What will we need, and who can be made ready?”

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What the research supports

Use the evidence carefully: planning helps because it creates preparation, not because it guarantees a perfect choice.

Transitions can disrupt performance

A broad CEO succession meta-analysis found negative short-term performance effects; longer-term effects depend on successor origin and strategic change.

Internal preparation can smooth transitions

Relay succession research found higher post-turnover accounting performance, higher long-term stock returns, and lower volatility.

Higher ed often starts behind

A private higher education study found significant absence of presidential succession planning and cultural obstacles rooted in academic tradition.

Responsible takeaway: *planned succession preserves strategic stability and institutional options. It is not a promise of automatic performance improvement.*

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A road less traveled…for higher education

A practical framework for turning succession from an event into a discipline.

1
Define future role requirements

2
Assess leadership against those requirements

3
Make an actionable readiness judgment

4
Develop depth and address gaps

5
Govern the process over time

The sequence matters. Start with the future role rather than the current incumbent or the most familiar internal candidate.

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Why higher education makes this harder

The governance and culture of colleges and universities complicate succession planning.

Shared governance

Multiple stakeholders legitimately expect a voice.

Academic tradition

Discussing succession may be perceived as political or premature.

Distributed authority

Influence often matters as much as formal control.

External visibility

Presidents and senior leaders carry donor, community, and public confidence.

Role ambiguity

The future role may require a different mix of academic, financial, and external leadership.

Confidentiality

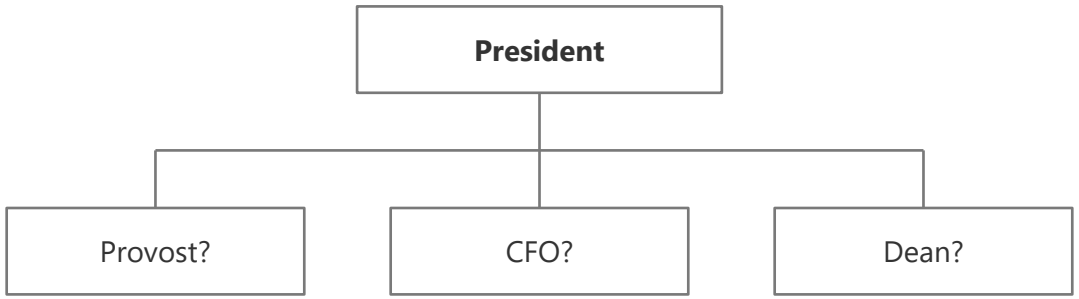
Too much disclosure creates politics; too little creates risk.

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Succession planning is not a replacement chart

Names in boxes do not answer whether anyone can lead the future institution.

Replacement chart



Succession discipline

- What will the role require?
- What capabilities do we have?
- What can be developed?
- Where is a transition needed?

The replacement chart is an output. It should not be the starting point.

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Start with the future role — not the incumbent

The incumbent's strengths should not become the job description for the next leader.

Institutional strategy

Future challenges

Role requirements

Assessment criteria

Future role profile

Question for the institution

If we were hiring for this role three years from now, for what traits and characteristics would we be looking?

What the profile must capture

- Strategic agenda
- Stakeholder environment
- Leadership capabilities
- Experience requirements
- Known transition risks
- Cultural and institutional context

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Translate strategy into leadership requirements

Succession begins with strategy, not biography.

Institutional requirement	Leadership implication
Major campaign / fundraising	External presence, donor credibility, relationship orientation
Enrollment pressure	Market judgment, academic partnership, decisive resource allocation
Financial restructuring	Financial acumen, operating discipline, change leadership
Academic transformation	Academic credibility, coalition building, influence without command
Partnerships / affiliations	Strategic judgment, negotiation, external orientation
Cultural repair	Trust building, communication, organizational leadership

Many institutions need several of these at once — the question is how the institution prioritizes them, and how the current team's strengths shape that priority.

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A future-ready executive capability model

The assessment lens should reflect the institution's strategy and context.

Strategic judgment

Can define choices and trade-offs, not just manage activity.

Operating discipline

Can translate strategy into execution, metrics, and accountability.

Stakeholder leadership

Can build trust across Board, faculty, donors, administration, and community.

Financial acumen

Understands resource allocation, risk, and institutional sustainability.

Change leadership

Can move the institution through resistance, ambiguity, and disruption.

Learning agility

Can grow into a larger or materially different leadership requirement.

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Performance evaluation and succession assessment ask different questions

A strong current performer is not automatically ready for a materially different future role.

Performance evaluation

How well did this executive perform in the current role over the current period?

Succession assessment

Does this executive have the capability, potential, and readiness to perform the role the institution will need next?

Beware the Peter principle: do not confuse "doing the current job well" with "being ready for the next job."

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Performance, potential, and readiness are different things

Credible succession planning requires all three judgments.

Performance

Evidence of effectiveness in the current role

Potential

Capacity to grow into a larger or different role

Readiness

Likely timing and conditions under which the individual could succeed

Succession decisions fail when one of the three is assumed rather than tested.

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Assessment should be evidence-based

Reputation and tenure are not sufficient evidence of future-role readiness.

Career history

Scope, progression, and relevant leadership experiences.

Executive interview

Motivation, judgment, aspiration, and learning orientation.

Behavioral data

Leadership style, decision patterns, and adaptability.

Stakeholder input

How the executive leads across constituencies.

Performance record

Evidence of execution, accountability, and outcomes.

Relevant experiences

Work that approximates the future role requirements.

Future-role fit is a judgment formed from multiple evidence sources — not a reputation-based conclusion.

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A practical executive assessment process

The process should be rigorous enough to support a real decision.

1

Confirm role profile

2

Gather evidence

3

Evaluate capabilities

4

Identify gaps

5

Determine readiness outcome

Too often the output is a generic development report when it should be an actionable conclusion.

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The assessment should frame a decision point

Ready, developable, and transition are all legitimate outcomes.

READY / RIGHT FIT	DEVELOPABLE	TRANSITION REQUIRED
Credible option now or with limited additional preparation.	Specific gaps can be closed within a realistic succession horizon.	Future requirements and current capability are unlikely to converge in time.

A process that cannot reach the third conclusion is not really assessment; it is validation.

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Outcome 1: ready / right fit

A credible successor is not necessarily an anointed successor.

What it means

The individual has the capabilities and experiences required or is close enough that the transition risk is manageable.

What to do next

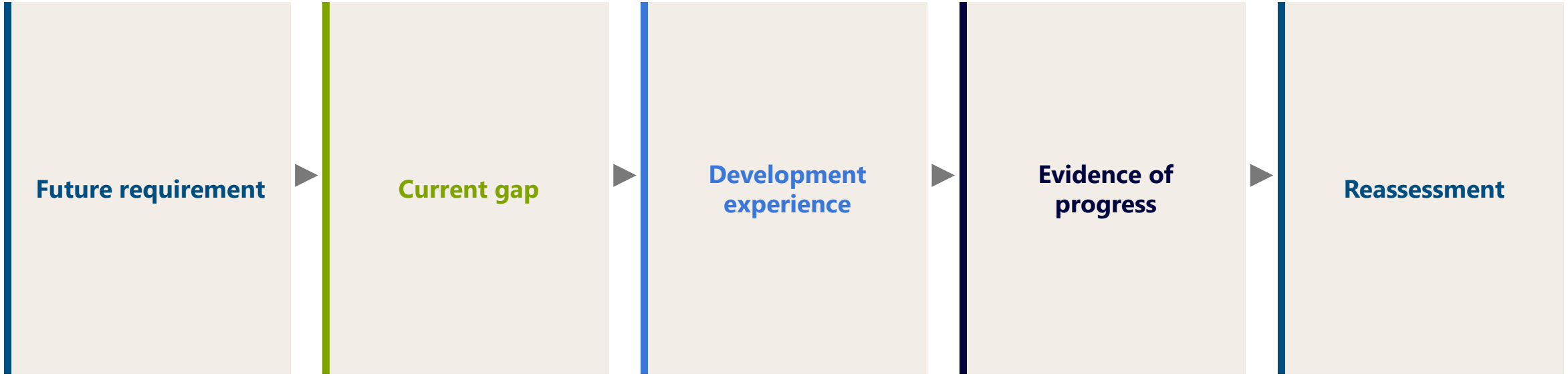
Continue testing readiness, broaden exposure, manage retention risk, and keep alternative options alive.

Ready means "credible option," not "the Board has already made the decision."

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Outcome 2: developable

Development only works when the gap is specific, material, and realistically closeable.



A development plan is credible only when it links a known future requirement to a specific experience that can produce observable progress.

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Outcome 3: transition should be anticipated

Sometimes the responsible conclusion is that the future role and the individual are diverging.

What the evidence may show

The gap is too large, the required development horizon is unrealistic, motivation or learning agility is insufficient, or the institution needs a materially different profile.

What it does not automatically mean

It does not necessarily mean immediate removal. It means the institution should plan thoughtfully rather than drift into a crisis.

Avoid the polite fiction that every gap is developable.

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Development is more than training

The best succession development gives leaders relevant experience before the stakes are highest.

Stretch assignments

Lead work that approximates future role demands.

Board exposure

Build judgment, presence, and credibility with trustees.

External leadership

Donor, community, government, and partner-facing work.

Cross-functional scope

Experience outside the executive's home discipline.

Crisis / change leadership

Test judgment under ambiguity and resistance.

Coaching and mentoring

Support reflection, feedback, and behavioral growth.

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Close the succession gap deliberately

Development should be managed as a disciplined investment.

Gap	Experience	Owner	Timing	Evidence
Limited fundraising exposure	Co-lead campaign planning and major donor meetings	President / Advancement chair	12 months	Donor feedback; dollars in pipeline
Weak financial restructuring experience	Lead enterprise cost-reduction initiative	President / CFO	6–9 months	Milestones met; Board confidence
Limited Board presence	Present quarterly strategy updates to trustees	President / Board chair	4 meetings	Clarity, judgment, trust

The test: could an observer see whether readiness improved?

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Build depth, not an heir apparent

A healthy pipeline creates multiple credible options without prematurely anointing one person.

Ready now	1–2 years	3+ years	No internal option
Provost	CFO	Dean A	External search likely
COO	VP Strategy	Dean B	

Roles shown are illustrative only.

Depth reduces political risk and decision risk. The institution can keep developing people without committing too early.

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A practical succession map

The Board does not need personnel minutiae; it needs visibility into leadership risk.

Role	Criticality	Incumbent risk	Emergency coverage	Internal candidates	Readiness	Action
President	High	Medium	Provost / COO	2 credible options	1 now; 1 in 2 yrs	Assess and develop
CFO	High	Low	Controller	1 option	2+ yrs	Broaden strategy exposure
Provost	High	Medium	Assoc. Provost	No clear option	External likely	Begin market scan
Advancement	Medium	High	Deputy VP	2 options	1–2 yrs	Retention plan

Illustrative example.

Use this as a risk-management tool reviewed annually, not a static filing exercise.

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Emergency succession and long-term succession solve different problems

Institutions need both.

Emergency succession

Who can keep the institution operating tomorrow if a critical role is suddenly vacant?

Long-term succession

Who could lead the institution successfully over the next strategic cycle, and what must happen to make that possible?

Emergency coverage protects continuity. Long-term succession protects strategic choice.

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Who owns succession?

Succession planning is shared, but accountability must be clear.

Board

Owns presidential succession; monitors material leadership risk.

President / CEO

Owns executive team development and succession depth.

CHRO / HR

Facilitates process, data, development planning, and cadence.

External advisor

Provides objectivity, assessment expertise, process discipline, and market intelligence.

The Board should govern leadership risk without becoming the personnel department.

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What should the Board actually see?

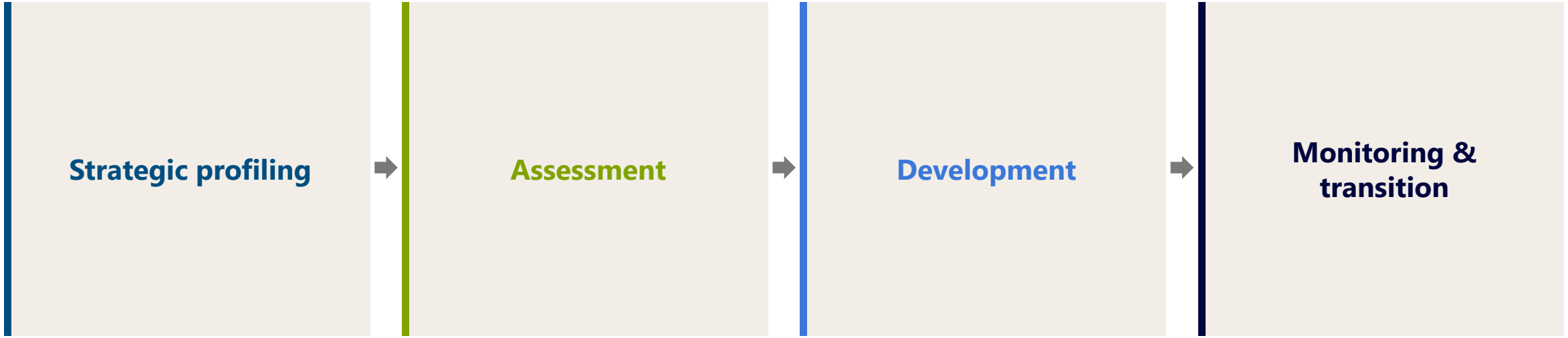
The right level of detail focuses on institutional risk and readiness.

Board should see	Board usually should not need
Critical roles and vacancy risk	Full assessment reports for every executive
Emergency coverage status	Unfiltered stakeholder interview detail
Readiness depth by role	Confidential development notes without context
Material gaps and actions	Unmanaged speculation about individual replacements
Approaching transition risks	Operational personnel administration

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Make succession a cycle, not an event

Strategy changes. Roles change. People develop. People leave.



…and back to strategic profiling

At least bi-annually: refresh the role profile, reassess readiness, test development progress, and update the succession map.

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Common pitfalls to avoid

Most succession failures are process failures before they become leadership failures.

Starting with names

Instead: Define the future role first.

Confusing performance with potential

Instead: Test future readiness separately.

Treating all gaps as developable

Instead: Be honest about timing and capability.

Over-anointing one person

Instead: Build depth and preserve options.

Ignoring emergency coverage

Instead: Plan for sudden vacancies too.

Letting the plan go stale

Instead: Refresh annually as strategy and people change.

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A practical 90-day starting point

Institutions do not need a perfect program to begin managing leadership risk.

Days 1–30	Days 31–60	Days 61–90
Identify critical roles and vacancy risks. Confirm who owns the process.	Define future-role requirements for the highest-risk roles.	Assess likely internal depth, identify gaps, and agree on development or transition actions.

A modest, disciplined start is better than a comprehensive plan that never leaves the agenda.

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Five questions to take back to your institution

Use these to test whether succession planning is real or merely aspirational.

1. Which leadership roles create the greatest institutional risk if vacant tomorrow?
2. Do we know what those roles will require three to five years from now?
3. Have we objectively assessed whether current leaders could meet those requirements?
4. Which gaps are genuinely developable — and which are not?
5. Would we be choosing among options today, or reacting to circumstances?

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Succession planning cannot eliminate leadership transitions.

It can determine whether the institution confronts them with choices or without them.

Questions & Discussion

Alexander Yaffe and Brad Jayne

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