



District
Management
Group

CASE STUDY

Succession Planning at Brevard County Public Schools (FL)

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Succession Planning at *Brevard Public Schools*

Brevard Public Schools' efforts around succession planning are an exciting innovation in PK-12 management. Brevard boasts a range of impressive accomplishments. Its student achievement results are some of the best in Florida, scoring first in the state in 2008 FCAT results in 5th grade science and 6th grade math and reading. There are 15 schools in the state of Florida recognized as national models of Professional Learning Communities at Work — all are in Brevard. Among numerous other recent accolades, the district was awarded the 2007 Florida Governor's Sterling Award for Performance Excellence, based on the National Malcolm Baldrige Criteria. The district is guided by a deep investment in strategic planning and leadership development, and DMC is pleased to profile the district's groundbreaking work in addressing succession planning.

| BY NICHOLAS P. MORGAN

As described in the article *Performance Management, Succession Planning, and Professional Learning Communities* by Hall, Salamone, & Standley, the concept of formal succession planning for building and sustaining leadership is not something that most school districts consider. When Brevard started its planning efforts, it became clear that the district was a pioneer in this area, which was less than ideal because it required so much more work! Through the district's strategic plan, the Human Resources Services team of Bill Hall, Joy Salamone, and Susan Standley was charged with the responsibility of creating a pilot succession planning project. When the Brevard team, under the leadership of Deputy Superintendent Leroy Berry, began its efforts, it had difficulties identifying any models considered "best practice" within PK-12. There had simply been very little focused information available on what schools and school districts can do to develop and maintain a pipeline of leaders for their systems as turnover increases.

Indeed, this gap was the genesis for DMC's work on the topic. As the Brevard team describes, an effective succession plan without effective performance management is like having no plan at all. Organizations must have both components in place—a plan and management of

that plan. Here, we focus on some of the management tools and processes that make succession management a reality.

How did this whole process begin, and why did the district make this a priority? Along with the general strategic need for investment in leadership identified by the Brevard County School Board and Superintendent DiPatri, specific feedback regarding the district's effectiveness against the Sterling award criteria highlighted the need to expand succession planning to district-level functional areas of the organization. The Sterling/Baldrige criteria highlighted the importance of process management, and specifically the replicable process of filling and sustaining positions.

To this point, a schematic of the process management approach developed by Joy Salamone in Brevard is shown in Figure 1. The process flow identified through these steps, as well as the allocation of responsibility within the district staff, is a clear (and perhaps unprecedented) succession planning process that includes a robust set of process indicators and outcomes metrics. As the old saying goes, you don't manage what you don't measure, and Brevard now actively *manages* the succession process. A common question asked of DMC by its members is "which data should we track?" Readers will note two categories of metrics being tracked in



Brevard: 1) the Process Indicators, which serve to calibrate performance of key milestones as the process evolves, and 2) the Quality Indicators, which address the process outcomes and enable district leaders to ask objectively “Were we successful?” A data-driven and dispassionate analysis of the process outcomes is fundamental to making succession planning efforts a continuous improvement effort.

Each step of this process map is ultimately broken out into a full program management structure, with process steps, owners, and timing. Beginning at the top left of the chart, the process begins with a definition of needs that originates with the Brevard School Board. The responsibility to clearly identify the leadership positions to be addressed expands to the district leadership team, while the requirements to articulate the specific job responsibilities expand to the leadership development staff. The management of the talent pool spreads across the next few process steps, and management responsibility becomes increasingly tactical, falling on the leadership development and human resources staff. Critical final decisions return to the more senior district leaders and the Board can be informed whether the need has been fulfilled, all using real data gathered and analyzed from each of the process steps. In summary, the succession process is actively being monitored and

managed, and as rollout continues to more leaders within the district, the process will always remain open for continuous improvement.

Brevard’s pilot program targeted the Superintendent’s direct reports and senior staff. In total, invitations to participate in the program were sent to 135 staff. Responses were received from 61 invitees, of whom 8 were interested in specific positions and 53 were interested in increasing knowledge and skills.

Participants in the program then completed a range of assessments in a variant of a 360 degree review process. Participants conducted self-assessments, as well as having assessments conducted by their immediate supervisors, one colleague or peer, and one subordinate. A fourth employee of the participant’s choosing also completed an assessment. Individual interviews of each pilot program participant were also conducted by the HR team. The HR team reviewed all data for each participant, and developed a Leadership Assessment Form for each participant. In a process similar to DMC’s bench strength exercise, an organizational grid was developed and candidates were identified as Ready Now, Ready in One Year, and Ready in Two Years. Coaching and mentoring arrangements were made, as well as the program development for formal training. ▷

FIGURE 1

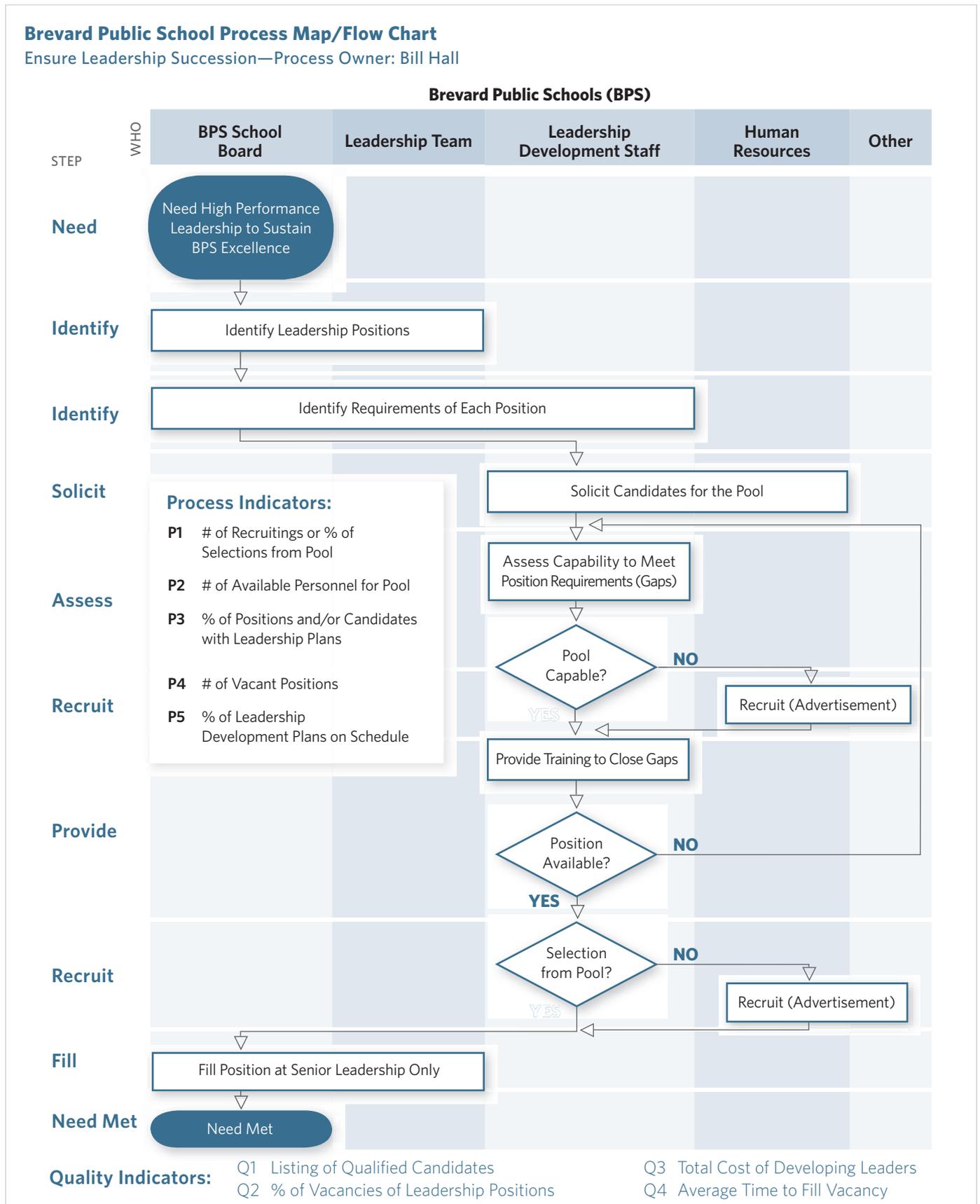


FIGURE 2

Instructional Leadership Pathway

Leaving a Legacy of Leadership for Brevard Public Schools

Leadership Awareness Series for Instructional Personnel

Program focuses on teacher leadership development and teacher leadership skills. Program focuses on identifying leadership skills in teachers who are interested in learning more about educational leadership. The primary audience is comprised of teachers who hold a Bachelor's Degree. The primary purpose of this series is to encourage these teachers to pursue a Master's Degree in Educational Leadership.

Leadership Awareness Training I

Program focuses on self-assessment activities and competency acquisition. Awareness sessions focus on the process Brevard Public Schools uses to interview and select its assistant principals. There is an AP shadowing component included in this program. Participants must hold a Master's Degree.

Leadership Awareness Training II

Program focuses on the organizational structure of Brevard Public Schools. An overview of each of the school system's divisions is given along with an overview of the individual roles and responsibilities of district-level administrators and leaders. Participants must hold a Master's Degree.

Assistant Principal Pool

Interested, qualified applicants apply to the Assistant Principal Pool. Applicants who meet all requirements of the AP position are interviewed. The names of the successful applicants are entered into the AP Pool. Only these individuals can apply for advertised AP vacancies.

Assistant Principal Position

Schools in Brevard Public Schools have assistant principal positions and/or Dean/AP positions. The number of positions and the length of service of each position during the school year are determined by the size of the school, the level of the school, and duties and responsibilities of each position.

Preparing New Principals Program (PNPP)

The Preparing New Principals Program is the principal preparation program for our building principals. This in-depth, two-year program is based on the Florida Principal Leadership Standards. This comprehensive leadership development program provides each participant with a professional development team which guides his/her development through a variety of job-embedded activities and experiences. Successful completion of this program leads to Florida certification as School Principal.

Principal Position

The principalship is the most important leadership position in our schools. The primary responsibilities of the building principal's position are to serve as the instructional leader of that school, to ensure a safe environment for students and staff, and to provide support and resources to ensure that all students are served with excellence as the standard.

The need and desire to grow instructional leadership skills is nearly ubiquitous among public school districts. For emerging leaders, Brevard helped clarify the steps in this growth, as well as outline the specific training and skill growth opportunities that would support a specific career trajectory. In Figure 2, the Instructional Leadership Pathway steps are outlined, and clarify the talent pools that are referenced in the overall succession planning process.

Finally, Brevard has invested up-front in the ongoing management process to keep the process honest, fresh, and accountable. As discussed above, the plan to monitor, communicate and evaluate the Succession Plan itself was developed, and is critical for long-term sustainability and improvement of the program as a whole.

The organizational grid that lists employee readiness is updated regularly. Progress is measured and communicated through process measures and outcomes, as noted in Figure 1, and are reported through the ongoing Brevard Strategic Plan reporting protocols.

The Brevard process is currently entering a second phase of rollout, whereby the group of leaders addressed through the plan will expand significantly. The pilot phase began with a self-selection of leaders, and future phases will rely more on the proactive identification of emerging talent within the district.

DMC commends this work and believes that Brevard is truly a national leader in developing these management systems. □