

## Journal of STEM Teacher Education

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Volume 42  
Issue 1 *JITE Spring*

Article 3

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March 2005

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### Recommended Citation

Geroy, Gary D.; Caleb, Denise; and Wright, Phillip C. (2005) "Understanding and Articulating Effective Succession Planning: A Means for Infusing Influence by NAITTE Constituencies," *Journal of STEM Teacher Education*: Vol. 42 : Iss. 1 , Article 3.  
Available at: <https://ir.library.illinoisstate.edu/jste/vol42/iss1/3>

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**Understanding and Articulating Effective Succession  
Planning: A Means for Infusing Influence by NAITTE  
Constituencies**

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If there is one thing that can be said about the NAITTE organization, its members, and its constituents, it is that we are dedicated and focused, perhaps to a fault. As an organization of educators and trainers whose content expertise is always evolving, we continuously demonstrate a commitment to developing our programs to states of efficiency and effectiveness that produce measurable quality outputs. First and foremost, we focus on understanding and articulating best teaching and learning practices. At another—albeit less intense—level we look to provide insight into underlying theory as to what is working. These are clients-as-learners oriented notions with an instructional focus. But is this all our expertise encompasses?

We suggest that the NAITTE organization must be equally capable of influencing strategic leadership succession planning in order to optimize our various fields' responses to our ever changing environment. Furthermore, knowledge of leadership-succession-planning best practices in our (NAITTE's) constituents' host/home environments (NCHHE) may provide us with an advantage toward sustaining our ability to face emerging political and organizational challenges. This skill and knowledge set represents a non-instructional focus for NCHHE.

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### **Mission Survival – A Genetics Concept**

In our discussion, we construe technology as something broader than the impression of hardware, software, and other images that are commonly conjured up by the use of the term. Instead, we characterize technology as a structure incorporating elements of ordered and controlled relationships with defined systems, whether the systems are concrete or abstract. In this structure, every profession or discipline, along with its representative organizations, is challenged to pass along the critical skills and normative elements of its culture, content, and process in order to ensure its survival. With that said, every technology we address with our expertise, either at the theory or articulated level, is built in part on previous generations of knowledge and methodology. These elements are passed along like critical genetic bits that are either modified or embraced as an underpinning of the “new and improved” next generation. In effect, these are the genetic elements of our academic and professional being.

Conversely, changing environments may require the infusion of new genetic bits to ensure optimal evolution of our profession and processes. This may mean borrowing theory or systems from other disciplines and infusing them with our own best thinking. It may also mean assimilating new norms and accepting new ideas to ensure survival and effectiveness.

NAITTE, with the knowledge and skills embodied in its constituent professions, does not exist in a vacuum. In order to incorporate the utility and value of what our profession contributes to the advancement of the human and economic condition, we must ensure that we remain a part of the gene pool upon which our environments’ current and evolving leadership is structured. Through strategic leadership succession planning, we must maintain our genetic contribution to our host/home organization.

Occasionally, by chance, we get “good luck” leadership; leadership that, at best, understands our place and values our attributes in a strategic venue or, at worst, sees our functions as a minimum threat to resources and therefore tolerates them. Unfortunately, in a time of fiscal and political turmoil concerning

education and training of today's and tomorrow's workforces, reliance upon luck is ill-advised. This approach may find our programs discarded or minimized in favor of more politically popular "flavor-of-the-month" initiatives.

### **Proposition**

In support of the discussion to follow, we submit the following proposition: For the constituent elements of NAITTE and our profession to survive long term and become optimal contributors to the advancement of the human condition, we must engage proactively in leadership succession planning, the outcome of which affects what happens to us in the larger contexts of educational systems and units and other professional structures.

We suggest that understanding and engaging in meaningful succession planning for leadership in our host/home environments can solidify our sense of place. We further suggest that whether one is in charge of planning the optimization of an organization's performance or responsible for influencing the place of an entity in an organization's larger structure and culture, understanding effective succession planning and guiding the leadership selection and evolution process is critical.

We will put forward our newly conceptualized succession-planning model to suggest how to better effect succession planning as a manager or as a participant in the succession-planning process. We will use the broad concept of human resources to embrace individuals, whether leaders or content experts, in the focus of succession-planning efforts. The model itself embraces two analytical dimensions. The first dimension, skills, is the typical standard that managers employ or that leadership applies in order to make succession planning decisions within organizations. This dimension, when used alone, is classified as replacement planning. The second dimension is cultural fit. This dimension refers to norms and values and is infrequently used in analysis. We submit that the two dimensions when used in consort ensure the passing along or the infusion of appropriate "genetic bits" into future leadership. In turn, this leadership advances inquiry and articulation in our fields of study

and in so doing, evolves and sustains NAITTE's appropriate sense of place among its related programs.

#### **Succession Planning**

Succession planning was first introduced by Henri Fayol who believed if succession planning needs were ignored, organizations would not be prepared to make necessary transitions (Rothwell, 1994).

Human resource succession planning (HRSP) is “a deliberate and systematic effort by an organization to ensure critical personnel continuity in key positions and encourage individual advancement” (Rothwell, 1994, p.28). Succession planning allows an organization to prepare for the absence, departure, death, retirement, or termination of an individual. It provides for continuity of culture and the evolution of necessary skills for an organization (Blaskey, 2002; Husting & Alderman, 2001; Carey & Ogden, 2000; Arnott, 2000; Schein, 1999; Swanson, 1994).

For NAITTE professionals, judicious succession planning can ensure the survival of the current curriculum and learning content as well as secure our continued and valued presence in education and our contribution to world-of-work strategies.

#### *Succession versus Replacement Planning*

Replacement planning is a means of managing for risks by simply replacing personnel (Rothwell, 1994). The term “replacement ready” is commonly used interchangeably with “succession planning,” but the two concepts differ in a very crucial way. Succession planning focuses on strategic and systematic capability and capacity readiness. Succession planning is strategic rather than reactive, using goal setting and analysis of capability together to develop a plan of action to make a successful strategic transition from one qualified individual to his or her replacement. Formal succession planning embraces not only crisis-response replacement actions but also emphasizes a strategic proactive philosophy (Fairfield-Sonn, 2001).

In contrast, replacement planning is mainly a maintenance process. It is characterized by having no formal plan in place because the replacement planning focuses on damage

control in response to some unexpected happening (Fairfield-Sonn, 2001).

Too frequently for NAITTE professionals, our professional and constituent environments are subject to replacement-planning thinking. For example, if we lose a tech-ed teacher or corporate trainer, the response is simply to find a content expert and “plug in a new body.” However, by emphasizing a succession-planning philosophy, we engage others and ourselves in vision building, which provides an understanding of how we must evolve to support our changing environment and reaffirms our future place in it.

In addition, succession planning identifies necessary developmental opportunities and strategies for talented employees who otherwise might be lost due to turnover. Carefully evolved HRSP can proactively identify shortages in the workplace and create a pool of qualified successors to meet the just-in-time needs of the organization (Dolan, Belout, & Balkin, 2000; Rothwell, 1994; Swanson, 1994).

### *Organizational Culture*

The values, mission, and vision of an organization (including professional entities such as NAITTE) are artifacts of the organization’s culture. The values of the organization speak to the beliefs of the organization and are influenced by the people who make up the organization. The mission speaks to the purpose of the organization. The vision speaks to the future goals of the organization. Together, these play a role in how the culture of the organization is defined. A simple definition of organizational culture is offered by Fairfield-Sonn (2001) as “how we do business here” (p. 38).

The impact of culture becomes a critical piece when determining successors because successors may or may not embrace the norms of the culture of the organization for which they will become responsible. Carefully managing potential conflict can harvest positive outcomes. The key is to neither avoid the conflict nor to bi-polarize the philosophies at stress in the conflict. Frequently, the bi-polarization is expressed in the boisterous rejection of both new and old thinking by the conflicting parties (Husting & Alderman, 2001; Winn, 2001;

Carey & Ogden, 2000; Simonsen, 1997). Because of this potential conflict, understanding cultural influences in HRSP may impact the choice of an internal or external successor (Gilbert, 2002; Fairfield-Sonn, 2001; Bridges, 2000; Goffee & Jones, 1998; Simonsen, 1997).

#### *Internal versus External Succession Selection*

The culture of an organization can be impacted by any change of successors, but it is often believed that the core values and norms of the organization are less likely to be disrupted with an internal successor. In the *Good to Great* study by Jim Collins (2001), Collins's research team focused on a review of leadership succession. The team discovered in examining successors in the identified "great" organizations, that only one organization out of the eleven studied failed to utilize an internal successor to the CEO of the corporation (Collins, 2001).

Succession planning that embraces internality prioritizes selecting a successor from within the current employee base. Among other benefits, it is believed that this internal focus contributes to maintaining a stable organizational culture.

The Collins (2001) study raises questions as to whether internal or external selections make better successors to leadership positions. If the successor is internal, will he or she be able to accomplish the internal transition in position and satisfy the expectations of peers? If the successor is external, will he or she be able to adapt to meet the expectations and demands of the established organization culture? Another question emerges asking what role culture plays in determining which choice is best for the organization. For NAITTE this may mean seeking out and embracing new, heretofore unknown constituents—in effect engaging a new philosophical market.

#### *When there is absence of HRSP*

When a crisis occurs in an organization, enforced or reactive changes may be the way to deal with the crisis (Lewis, 2000). In such times, if successors are needed, they are needed immediately. During times of a reduction crisis when organizations are forced to downsize, a study of three Canadian firms determined that a succession plan for the survivors was

critical to the successful continuance of the organizations (Dolan, Belout, & Balkin, 2000).

However, even without a crisis as a stimulus, Rothwell (1994) suggests that there are several challenges an organization may face without formal HRSP. Lacking formal HRSP an organization may find that

- key positions are not filled in a timely manner
- key positions can only be filled with external successors because internal ones have not been developed
- key positions have only a limited few who are only partially ready to step in as a successor
- key positions continue to face frequent and unpredictable turnover
- potential replacements for the key positions lack the performance skills in their current roles
- the best talent in the organization continues to leave at a rapid pace
- individuals leave the organization to gain the advancement they desire
- the decision makers of the organization complain that the talent pool and internal recruitment are not at adequate levels of competence
- employees complain of favoritism and nepotism
- employees and decision makers express concern that qualified individuals are passed over for key positions.

#### *The Successor's Challenge*

For the successor, the visualization of his or her own career is often hard to imagine without some notion of his or her future fit in the current organization. This includes knowing the climbing frame in the structure of the organization in order to conceptualize a future career path (Gunz, 1989). Gunz suggests that successful career mapping requires knowing the five transitions that may lead to movement from one position to a new one. Gunz labels the transitions as

1. *Continuity*. The new position involves a new job, perhaps at a different level of responsibility, but does not involve a



change of location or activity. If it is a promotion, it does not involve significantly broader responsibilities but is mainly a change in title.

2. *Cosmopolitanism*. The new position involves activities that are familiar to the manager but are carried out in an unfamiliar location.
3. *Innovation*. The new position has very little in common with what the successor or manager has done in the past. It is a new experience for the successor.
4. *Iteration*. The new position has links with the manager's past, but not of the simple, direct kind as in continuity and cosmopolitanism.
5. *Expansion*. The new position involves iteration, but with the added feature that the new position involves some activities new to the manager or successor as well (Gunz, 1989, p.125).

Continuity transition is important to those internal successors who are being groomed for new leadership positions (Messmer, 2002; Winn, 2001).

The second transition, cosmopolitanism, addresses both internal and external successors. It embraces those internal successors who must relocate as well as external successors who know the activities or tasks to perform but need to operate in or adjust to a new culture and location (Leheny, 2003; Swanson, 1994).

The innovation transition refers to a successor, internal or external, who is being career tracked or targeted for a position but who has not necessarily performed the associated tasks before. It is in these circumstances that task analysis in HRSP becomes critical to determining if the successor is a fit for the new activities that he or she will be required to perform in the new position (Messmer, 2002; Carey & Ogden, 2000; Gunz, 1989).

The successors in an iteration transition may not be moving from the same type of position, but, somewhere in their past, they have been exposed to similar activities and have previously performed similar tasks. Because they have performed comparable tasks before, such transitions appear simple. Still, the successors may need to adjust to the current norms of an

organization's culture relative to the new role (Schraagen, Chipman, & Shalin, 2000; Swanson, 1994).

Expansion is similar to iteration except that the successor also has the opportunity to learn something new. So while there is familiarity which the successor can rely on from his or her past experience, the opportunity to move forward is coupled with a need to learn new skills (Simonsen, 1997; Gunz, 1989).

Relating HRSP to the research of Gunz, we can see the transitions that a successor may travel through as he or she moves to a new position and takes on its associated activities. Whether making a selection employing internal or external successors in HRSP, these same transitions may occur.

The implications for NAITTE as an entity can be challenging, as we may need to consider embracing historically different constituent representation in our leadership. Alternately, a person in the current succession process may need to step outside the confines of historic frameworks to embrace and value new philosophies and paradigms of influence and work to integrate these philosophies and influences into the NAITTE organization.

#### **An Integrated Task and Culture Analysis HRSP Model**

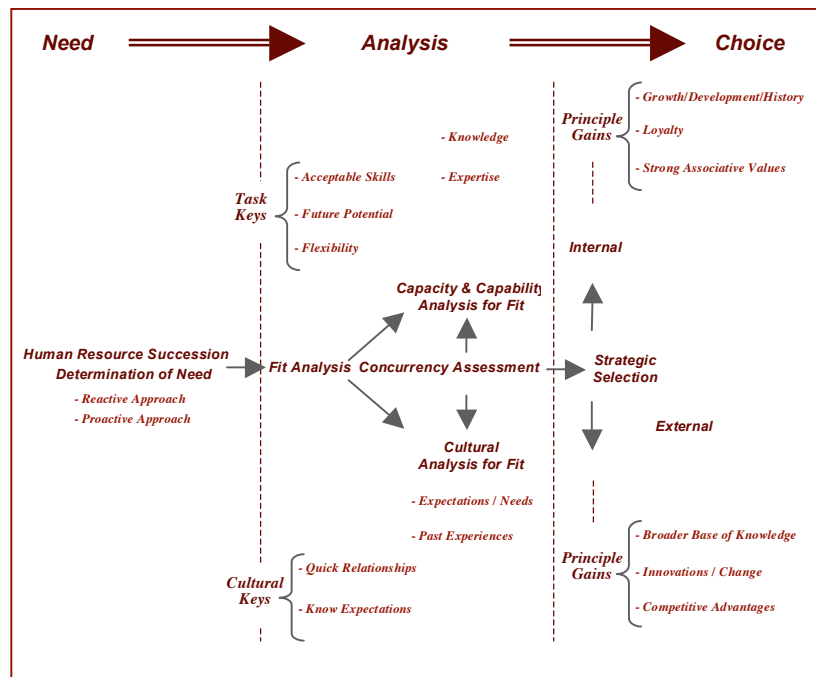
The literature supports the idea that defined HRSP will assist organizations in determining the best person for the evolving needs of the organization. The literature further suggests that utilizing both task analysis and cultural analysis to assess a candidate's fit comprise a powerful means for helping to select the appropriate internal or external successor. By using both task analysis and cultural analysis in HRSP, it is possible to determine and evaluate both need and fit relative to capabilities and capacities that are task focused as well as to those that are interpersonally focused (Fairfield-Sonn, 2001; Carey & Ogden, 2000; Swanson, 1994; Kotter & Heskett, 1992).

This concept of equally employing task analysis and cultural fit is advanced in our model (see Figure 1). The model embraces a "strategic fit assessment" process, which underlies the systematic understanding of performance needs within organizations. The model also visually organizes the dynamics that become factors when designing formal HRSP using both task

performance and cultural alignment in the succession selection process.

We suggest that our model can be used by NAITTE members as an evaluation template or as a criterion-setting process to guide selection of our future leaders. Within the NCHHE, our members can use the model to assess the leadership candidates with regard to fit for sustainability or to monitor their progress and function within their environments. The discussion of the model that follows, although not customized to address all potential NAITTE scenarios, raises reflection and assessment issues which affect and concern NAITTE.

**Figure 1**  
*Integrated Task and Culture Analysis HRSP Model*



*The Structure of the HRSP Model*

The model is broken into three main phases: *Need*, *Analysis*, and *Choice*. Moving from left to right, the model guides the suggested integrated task analysis and cultural analysis approach to HRSP.

*The Need Phase.* The need phase guides the first activities of the model. In this phase the organization determines whether it is reacting to a current situation or proactively planning for anticipated situations.

A reactive approach focuses on the immediate need to “replace” a leader. The main concern of the organization in this situation is to respond to a crisis such as death, unforeseen retirement, disability, or non-performance.

A proactive approach is used when the organization looks strategically to the future, using HRSP to address anticipated needs that are in response to strategic imperatives. The organization is focused on identification of a successor and has time to invest in the growth and development of that chosen successor. The proactive approach, like the reactive scenario, considers the potential of internal or external successors to fulfill the requirements of the position.

*The Analysis Phase.* The analysis phase has two principle elements. These are fit analysis and congruency assessment. Fit analysis requires the organization to perform assessment along two dimensions of importance: task keys and cultural keys.

In the model, the concept of fit analysis determines if the successor’s skills and knowledge are acceptable and adequate, and if the successor’s cultural norm congruence is sufficient to allow him or her to be effective in the new role. Fit may also embrace an assessment of the individual’s potential to develop more skills and knowledge to meet future needs and to evolve with the organization’s culture. Fit addresses not only the individual’s developmental potential but also the organization’s future utility for the individual (Simonsen, 1997; Rothwell, 1994).

The key to success at tasks required of the successor is assessed along three dimensions. The three dimensions are current skill level, potential to acquire skills needed in the future, and a confidence level to articulate these skills.

The key to success within the cultural domain of the organization can also be assessed along three dimensions. These dimensions are the ability to minimize conflict and disruption that can be associated with the placing of new personalities in roles, the ability to forge critical relationships quickly, and the ability to understand the norms associated with the culture of the organization.

In assessing the congruency of fit, the model suggests engaging devices that can determine both skill and cultural fit simultaneously. Historically, this integrated analysis of task and culture has not been considered.

The task analysis function of the model provides the organization with the means to determine if the successor has the knowledge and expertise to perform the tasks of the job. If the individual has the capacity there is congruence; if he or she lacks the capabilities, there is incongruence. The more the successor's skills match the tasks that he or she needs to perform the job, the more natural it is for the individual to perform the task. When the successor has the capacity and capabilities for performing the task, the task becomes second nature. The successor is able to perform the task smoothly even while embracing challenging situations. He or she displays a degree of flexibility, eagerness, and enthusiasm about the new challenge. If a successor has great difficulty with the mental, physical, or intellectual capacities of performing the task, the fit will be in jeopardy (Rothwell, 2002; Price, 1985).

The culture analysis function of the model determines if the individual's cultural expectations, needs, and past experiences are in line or congruent with those of the organization. If the two are in accord, there is a fit; if not, there is lack of congruency in this area (Winn, 2001). When there is a fit for the culture, a successor can be introduced and integrated into the organization or new work area with a minimum of disruption. Relationships form quickly, and the successor rapidly evolves an understanding of what is expected and swiftly adopts the beliefs and cultural norms of the organization (Schein, 1999).

If the successor has come from within the organization and is accustomed to the cultural expectations, this may be a nominal issue. If the individual is an external successor, but

comes from an organization in the same industry or with similar cultural norms, the transition may go smoothly and a cultural fit may be established quickly (Gilbert, 2002).

*The choice phase.* Once the congruency assessment is accomplished, the organization can move on to strategic selection. The selection element in HRSP allows the organization to select an individual for reasons that truly meet the current and future needs of the organization. As Rothwell's (2002) research points out, there are a number of approaches that an organization can utilize in the selection process of a successor. The various approaches are driven and greatly impacted by the decision of whether to hire an internal or external successor. Internal and external HRSP choices both serve their own purposes, depending on the organizational needs, and carry very different implications.

The selection of an internal successor provides opportunities for an organization to invest in an individual from the beginning of the partnership with the organization. The analysis of the individual's task capabilities, future potential, and cultural fit can be nurtured over time, allowing for the successor to grow and mature in the organization. If the organization's culture values the selection of internal successors, a strong camaraderie can be created among employees. The culture can also motivate and encourage quality in the workplace as individuals strive to out-perform each other in order to place themselves as the top selection for an internal successor position. This cultural phenomenon creates competitiveness and drives performance to heightened levels (Messmer, 2002).

The principle gains of selecting an internal successor include the growth and development of the individual, strengthened loyalty, and a strong commitment to the mission and values of the organization. If an internal successor has remained loyal, performed with high levels of expertise and knowledge, and started as a founder of the culture or has embraced the culture, the impact of that individual's selection as a successor in a leadership role can be profound for the future advancement of the organization (Rothwell, 1994).

Conversely, there may be disadvantages to internal succession. Selecting an internal successor may impede the ability of the organization to make needed changes for growth

into new areas of the industry. Oftentimes an internal successor is attached to traditional or old ways of doing things, which may reinforce a very static and established culture, hindering both the growth and potential of the organization. Additionally, although the individual may be a fine cultural fit and understand and perform the requirements and tasks of his or her current position with ease, the successor's ability to do equally well at the next level in the organization may be constrained by an attachment to his or her old ways (Lewis, 2000).

Just as internal selection has both strong and weak points, so too does the hiring of external candidates. The choice depends heavily on the position, timing, organizational needs, and, most importantly, the task and cultural fit. The congruency assessment is particularly important in determining an external successor's ability to make the transition into the organization's culture (Winn, 2001).

The principle gains of hiring an external successor are often related to his or her expertise level and subject matter knowledge. If the successor has a history in the industry and has the additional education or certification to make a significant impact in the position and on the organization, the selection may be warranted. An external successor often brings innovation and vision that can guide the organization to a higher level of development (Winn, 2001; Schraagen, Chipman, & Shalin, 2000).

In times of a changing market or industry, the challenge of remaining competitive may become overwhelming to an organization. Often a new approach or strategic plan is needed. Hiring an external successor can be helpful when expanding into new product lines, markets, or international arenas.

Another reason for choosing an external successor is to intentionally cause a cultural change to occur. An organization's culture may be dysfunctional and an external successor may provide a catalyst for bringing about necessary changes (Rothwell, 2002; Winn, 2001).

The innovation and vision that an external successor brings to the organization can be a disadvantage as well as a gain. This is especially true if the successor's new vision is too far removed from the culture of the organization. In fact, a vision proposed by the external successor which is divergent to the

culturally embedded needs, definitions, and expansion strategies of the organization may be more of a hindrance than a help (Kotter & Heskett, 1992).

If the external successor has difficulty meeting the task capabilities or if the organization's expectations of performance are grounded in perceptions of required knowledge and expertise, the culture may have problems accepting an external successor who is viewed as not performing at the expected level. If in the past the cultural expectations of the organization have been to hire from within, and then the organization makes a decision to search for successors outside the organization, the impact on culture may be negative. Further, an organization that places a great value on remaining loyal to internal employees by hiring from within may find that hiring an external successor results in the creation of disloyalty, paranoia, and mistrust (Goffee & Jones, 1998).

### **Conclusion**

We have suggested the importance of HRSP to organizations and further suggest that it would be appropriate for NAITTE to employ this process. Effective HRSP reduces turnover and increases the useful longevity of both leaders and other employees in organizations. This process addresses selecting individuals for future succession as well as maintaining current human resources and developing their future roles within the organization, whether these be educators, trainers, technologists, leaders, or managers.

Despite the use of task analysis and cultural analysis independently to support succession planning, evidence indicates it is not common to engage both simultaneously in HRSP. The model presented suggests that succession needs may be analyzed with regard to current critical situations as well as anticipated ones. The model embraces the need to complete both a task analysis for fit of skills and capabilities and a cultural analysis to determine congruency of cultural norms. Finally, the model illustrates that the choice of internal versus external selection of successors depends on several dynamics, both having potential advantages and disadvantages.



When viewing leadership succession in environments that include NAITTE professionals, it is critical to ensure that the leadership possesses the desirable and appropriate “genetic bits” of both the needed skills and cultural norms that are positive to the stakeholders. These stakeholders include the NAITTE organization and its constituents. As the environment continues to change, it is vital to determine what skills and cultural elements need to be infused into the organization, field, or program so that it supports and sustains the NAITTE constituents’ efforts. The use of HRSP within NAITTE would explore the evolution of leadership from within or installation of leadership from outside the organization. Additionally, it is critical that the leadership of the environments upon which we rely for our professional and institutional existence exhibit characteristics relevant to our needs. If the emergent leadership in our operational environments does not possess skills and cultural elements critical to our fields, we may face biased evaluation barriers to our efforts and mission.

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