

Perceptions of Governance Boards on the Adoption of Succession Plans for Minorities at Predominantly White Institutions

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Abstract

This research study was conducted to investigate how trustees perceived their roles in promoting organizational culture and implementing succession plans that prioritize minority candidates for the presidency. The study also aimed to identify potential obstacles to such plans. The relevance of this research stems from the changing landscape of higher education leadership due to large numbers of retirement-eligible university presidents. In particular, this study sought to uncover strategies and practices that can be used to overcome identified barriers, thereby facilitating the advancement of diverse leadership in higher education institutions. The study involved interviews with fourteen trustees who had served on boards and participated in the selection of university presidents in predominantly white institutions in Mississippi and Tennessee. The participants had diverse professional backgrounds, including leadership positions in corporations, governments, and educational institutions. Their experiences provided valuable insights into the complexities of higher education and the factors considered by trustees when choosing university presidents, particularly in conservative states. Interviews shed light on the demands, challenges, and potential solutions related to talent development, recruitment, and retention of minorities in higher learning institutions. The findings highlight the need for trustees to examine presidential succession planning, address biases against minority candidates, and reconsider shared governance. Trustees believed that succession planning for presidents is a viable and crucial alternative to consider for the selection of presidents, so long as it does not preclude the possibility of vetting external candidates.

Keywords: *presidential leadership, succession planning, talent management, higher education*

Introduction

The speed and rate of the vacancy from Presidential positions in higher education institutions lend themselves to reshaping or rethinking how governing boards approach current presidential succession (Harper et al., 2017; Rutherford & Lozano, 2017). “Executive turnover in public and nonprofit organizations may be partially explained by governing board structures and politics” (Rutherford & Lozano, 2017). Research indicates the traditional route to the presidency via the academic route is meeting challenges, as “leadership aspirations beyond the department chair position decline serving as a source of the leaking leadership pipeline” (Baker et al., 2019). [Another] “contributing factor is the necessity to consider age, gender, ethnicity, and race in personnel decisions” (Lewis, 2018). Coupled with the changing ethnic landscape of colleges and the country, an aging workforce that contributes to more retirements, and the push for social change, the traditional model of college/university leadership replacement, stands for examination (Liera, R, 2020, Beardsley, 2018).

Because most higher education institutions do not have a systematic and planned strategy for selecting and developing their top leaders (specifically the presidency), there is a need to examine leadership recruiting and development methods (Rothwell, 2010). At the same time, impediments such as the stronghold of the shared governance approach, particularly public 4-year institutions, prohibit embracing succession planning strategies (Honu, 2018; Cramer, 2018). This has enormous implications for the traditional bias toward national searches for the presidency and other senior leadership positions (University of Iowa President Search Subject of Governance Investigation, 2015). However, current governance boards must consider the dynamic environment in which they monitor the future of their institutions, which necessitates the challenge of existing policies, practices, and the consideration of diversity in order to preserve the viability and profitability of their institutions (Rall, 2021).

The learning curve for incoming presidents is steep (Bomstein, 2010), necessitating a structure for training and development to assist candidates in changing and adjusting to the office. This study aims to determine how governance board members perceive their roles in facilitating organizational culture and traditional changes to

implement a succession plan for minority consideration at the presidency and investigate potential obstacles to such implementation.

Given the changing landscape of higher education leadership, explicitly focusing on people of color assuming the presidency through succession, the study is relevant for governance boards, academic administrators, and human resources professionals seeking strategies to attract, educate, and promote leaders of color. Institutions must fundamentally shift within the organization and community to accomplish this endeavor. According to an evolving narrative, higher education must undergo a metamorphosis to reflect shifting demographic patterns and appropriately prepare students for their roles in society (Mirza, 2017; Shepherd, 2017).

Study Purpose/Research Questions

The purpose of this study was to explore and gain a deeper understanding of the perceptions of governance boards on the adoption of formalized succession (or promotion) plans for minorities as university presidents, driven by Kaluzny and Hernandez's Stage Theory of Organizational Change as the framework. The research questions for the study were RQ1: What are the perceptions of board members in facilitating awareness, and solutions to the adoption of succession plans for minorities as university presidents? RQ2: What are the perceptions of board members in the adoption of succession planning as a new standard for minority presidential positions? RQ3: What are the perceptions of board members in modifying current systems, policies, and organizational structures to accommodate succession planning for minority presidential positions? RQ4: What are the perceptions of board members in institutionalizing succession planning as the preferred standard for minority presidential positions?

Conceptual Framework/ Literature Review

There are numerous organizational change theories, but the majority may be traced back to Kurt Lewin's change theory from the 1940s. These concepts split the process of organizational change into three or four stages. Many have criticized Lewin in recent years for presenting an overly basic approach (Cummings et al., 2015), and updated versions of this foundational theory have been formed. Currently, stage change theory is merged with Rogers's Diffusion of Innovation theory, which categorizes individuals according to their propensity to accept or oppose change. The conceptual framework for this study utilized Kaluzny and Hernandez's Stage Theory of Organizational Change, which extended the foundational research of Lewin, and is considered a more modern form of organizational change theory, through four distinct stages.

Stage Theory of Organizational Change recognizes the awareness stage as when the organization recognizes or understands that a change is necessary (Butterfoss, Kegler, & Francisco, 2008). The subsequent phase, initiation, involves the creation of policies, procedures, or directives for the new process. The third stage is the actual implementation of the plan in which the change is put into practice institution-wide. The culmination stage of the process is institutionalization. During this stage, the change is integrated into the institution's processes.

As part of the shared governance system present in higher education, which serves as the governing body of academic organizations, the board of trustees, the president, and the academic community all work together to make decisions on the management of the institution (AGB, 2017). Shared governance implies that all participants have some level of involvement and accountability in the decision-making process, even if this is not always the case at each point of the process (McGuire, 2019). Therefore, anytime a presidential post falls vacant, the shared governance system is responsible for organizing the selection of a new president (Yanhua & Qing, 2019; Dwyer, 2019). The roles of the presidents of colleges and universities are analogous to those of the chief executive officers of corporations inside their respective institutions and occupy positions of extreme complexity (Selingo et al., 2017).

According to Cooney and Martin (2021), academic functions of the presidency have primarily been shifted to other leadership roles, and Provosts, Deans, and Other Chief Academic Officials will continue to be charged with guiding faculty in curriculum development and academic planning. Despite these decisions, presidents are subjected to extensive scrutiny and are expected to ensure the institution's survival (Cooney & Martin, 2021; Selingo et al., 2017). College and university presidents have more shifting expectations, including increased rivalry than in the past. There is constant competition for students, financial and capital resources, faculty, and enhanced accountability for student achievement, retention, and graduation (Martin, 2021; Cooney & Martin, 2021; Artis & Bartel, 2020). The president is responsible for the entire campus and must maintain close ties with external stakeholders. External stakeholders include the broader community, alums and friends, benefactors, and internal stakeholders like employees and professors (Artis & Bartel, 2020; Ault, 2017; Cooney & Martin, 2021; Crim, 2021; Martin & Cooney, 2020).

According to a conventional and typical definition, succession planning is the ongoing process of identifying and preparing future leaders to assume leadership responsibilities within an organization, in times of vacancy. In higher education, succession planning is conducted on a limited scale, although it is frequent and widespread in business

and industry (Dopson et al., 2018; Parfitt, 2017; Calareso, 2013). Vacated positions present not only the absence of a physical employee, but also a substantial risk of institutional knowledge loss (Serenko, 2022; Bano, 2020).

The literature review showed that senior leadership retirement has profound implications for institutions of higher learning (Bano, 2020). As this cohort of aging professionals (referred to as boomers) departs the workforce, the academy is already facing a scarcity of skilled applicants to fill empty leadership posts (Cahill et al., 2019; ACE, 2017; BLS, 2017). Their retirement presents a significant challenge in knowledge retention (Serenko, 2022; ACE, 2017; BLS, 2017). Succession planning is a practical strategy for institutions to sustain skilled and effective leadership amid unavoidable transitional times, which supplies a pipeline of talent (Dahlan et al., 2021) and increases the likelihood of both short-term and long-term leadership continuity in an organization (Ahmad et al., 2020). However, succession planning in colleges and universities involves significant changes needed to make it effective (Ahmad, 2020; Calareso, 2013). Thus, personnel management tactics, especially engaging talent development approaches, have become essential to employee retention (Dalayga & Baskaran, 2019).

Succession planning refers to identifying and developing internal candidates over a prolonged period to take over leadership positions within an organization (Baker, 2019; Rothwell, 2015). Modern succession planning focuses on building a pipeline of potential leaders by identifying and developing individuals for increasingly complex organizational roles (Groves & Feyerherm, 2022). The contemporary model enables the building of formal long-term plans for leadership development, allowing schools and institutions to develop a pool of eligible applicants in anticipation of unfilled leadership positions (Baker et al., 2019, Chakraborty & Biswas, 2019), which contrasts with traditional means of leadership vetting through external searches. In an academic institution, there are various roadblocks that must be overcome before succession planning can begin (Cramer, 2018; Ahmad et al., 2020). To begin, a delayed response to retiring leadership and succession planning can be attributed, at least in part, to the institutions' governance structure as well as the customary practice of recruiting candidates from the outside (Jackson & Allen, 2022; Selingo et al., 2017). Secondly, higher education succession planning is rarely discussed or practiced, leaving them unprepared (Barton, 2019; Jackson & Allen, 2022).

The invaluable experience and insight of retirees can be collected through succession planning prior to their departure (Boyle, 2019; Sumbal, 2018). Since one of the most significant dangers posed by retirement is the loss of institutional knowledge to colleges and universities, succession planning would allow organizations to retain knowledge in anticipatory ways given inevitable retirements, thwarting knowledge loss (Boyle, 2019; Baldwin et al., 2018). It is important for every level of the company to have access to cross-functional development and mentoring opportunities (Nishii & Leroy, 2022; Bradley & Meade, 2022; Moore & Wang, 2017). Some academic institutions have developed leadership inside their organizations through the use of succession planning, but this practice is still relatively uncommon (Baker et al., 2019; Jackson, 2022; Selingo et al., 2017; Cavanaugh, 2017).

The rate of retiring Baby Boomers will impact all sectors (BLS, 2017; Perez- Arce, 2018), including higher education (ACE, 2017). In 2020, during the third quarter, it was reported that 28.6 million Baby Boomers reported removing themselves from the labor force due to retirement (Fry, 2020). Comparing 2018 to 2019, 3.2 million more retirees existed than in the previous year (Fry, 2020). Moreover, since 1996, participation rates among those aged 65 and older have increased consistently. The projected participation rate for employees aged 65 to 74 in 2026 is 30.2 percent, up from 17.5 percent in 1996. The projected participation rate for employees aged 75 and older in 2026 is 10.8 percent, up from 4.7 percent in 1996, therefore increasing the likelihood of more simultaneous retirements (Labor Force Participation Rate for Workers Age 75 and Older Projected to Be Over 10 Percent by 2026 : The Economics Daily: U.S. Bureau of Labor Statistics, 2019).

According to data collected from 7,000 accredited colleges and universities in 2017, 58 percent of college presidents were above the age of 60 (ACE, 2017). This figure is higher than it was in 2006, which was 49% (Gagliardi et al., 2017). In addition to this, the proportion of presidents who were 70 years old or older increased from 5% in 2006 to 11% in 2017 (Gagliardi et al., 2017). Consequently, it is anticipated that 58% of college and university presidents will retire during the next five years (Gagliardi et al., 2017).

Due to the retirement rate, colleges and universities undoubtedly will face periods of knowledge transfer and transition from predecessor to successor (S.M. & Sahney, 2022; Serenko, 2022), which can be lengthy to fill a presidential seat (Yanhua & Qing, 2019). Therefore, many institutions may experience a leadership void, complicated by organizational red tape (Kaufman et al., 2018). Since the vast majority of institutions have not made any preparations to face the challenge of a rapidly retiring leadership cadre (Jackson & Allen, 2022), the conversion from predecessor to successor may have unwanted and unexpected implications (Siambi, 2022). When current leaders voluntarily step down from their roles, colleges and universities tend to fill the openings as they arise, rather than proactively seeking candidates (Lovett, 2017). In exceptional circumstances, an organization might decide to put either a formal or an informal succession plan into action in order to produce a successor (Selingo et al., 2017; Bornstein, 2010), however, the vast majority of educational institutions do not have a

succession plan or strategy in place to deal with the problem of leadership turnover (Jackson & Allen, 2022; Cavanaugh, 2017).

Succession planning is widespread in the corporate world (Weisblat, 2018; Bottomley, 2018), but traditionally, the academic world has not acknowledged the concepts of corporate culture (Warter, 2019; Laasch, 2017; Berg et al., 2016). Plans for leadership transition look very different in the corporate world than they do in the academic world because of the differences in the organizations' missions, sizes, resources, and skill sets (Tebbe et al., 2017; Selingo et al., 2017). By providing education and development opportunities for potential future leaders, succession plans make it possible for an organization to maintain its position as a market leader (Chiocchio & Gharibpour, 2017). They also include possible leaders with varied areas of competence, years of experience, and generational differences, which allows them to avoid copying the strategies of previous leaders and provide a variety of ideas (Cox & Overbey, 2022; Weisblat, 2018). Additionally, succession planning enables organizations to evaluate their previous achievements, difficulties, and opportunities, so preventing subsequent leaders from making the same missteps (Bano et al., 2022; Jackson, 2022; Weisblat, 2018).

Radical transformations such as succession planning processes should be designed in accordance with the infrastructure and shared governance framework of specific colleges and universities (Cavanaugh, 2017). Shared governance refers to the group of individuals accountable for policymaking and making macro-level choices (McGuire, 2019). College and university administrators have a responsibility to exercise caution regarding the potential for an increase in conflict within shared governing structures brought on by this process (Cavanaugh, 2017; McGuire, 2019). A well-facilitated succession plan process, which includes all governance members (Bernard-Donals, 2022), is imperative when developing a blueprint of operational processes and protocols for continuity (Weisblat, 2018) and should make it easier to overcome the obstacles that can arise as a result of misunderstandings and lack of clarity (Chakraborty & Biswas, 2019).

Succession planning enhances the quality of an institution's current personnel, attracts new staff of higher quality, and it demonstrates that the organization cares about and values the people who are already working there; it also attracts new staff to an institution; and it boosts employee morale (Chakraborty & Biswas, 2019), and this results in cost savings for the organization (Ali & Mehreen, 2019; Davis et al., 2018; Seltzer, 2016). It is vital to note that succession planning will not always guarantee an internal successor (Jackson & Allen, 2022, Succession Planning: What the Research Says, 2016), but it does have other positive results (al Suwaidi et al., 2020). The proposal to enhance existing internal personnel through succession planning does not preclude the consideration of outside candidates for open positions (Jackson & Allen, 2022). Simply stated, succession planning merely raises the number of internally competent applicants for open positions (Chakraborty, 2019). In general, there is no set template for succession planning because the plans differ depending on the time, direction, breadth, and diffusion of the organization as well as the individual's own discretion (Weisblat, 2018; Rothwell, 2015).

The top-down approach that is taken in succession planning entails the deliberate and systematic recruitment and training of internal candidates for leadership jobs in advance of the departure of their predecessors (Schepker et al., 2018). The shared governance system in higher education has the potential to cause disruptions in the succession planning process due to both its structure and the recruitment practices that are used (Herron-Williams et al., 2017). Because the corporate strategy has traditionally been enabled from the top down, with the chief executive officer (CEO) working in conjunction with the board of directors (Schepker et al., 2018), the shared governance concept, which allows authority to be decentralized among many different groups, stands in stark contrast to the succession planning practices of corporate entities (Geib & Boenigk, 2022; Honu, 2018).

The members of the shared governance system provide two key roadblocks, both of which are connected to succession planning (Barton, 2019; Honu, 2018). To begin, the policies that are currently in place result in senior leadership roles being filled primarily through external recruitment (Jackson & Allen, 2022; Bano, 2020; Barton, 2019). Secondly, because there are so many different parties participating in the succession planning process, achieving consensus throughout the process's numerous phases presents a complex set of obstacles (Jackson & Allen, 2022; Bano, 2020; McDonagh et al., 2013). For succession plans to be implemented effectively, there must be clear and consistent communication within the system (Ahmad et al., 2020). Most crucially, it might necessitate a change in the policy that governs the hiring process for top leadership positions. Succession plans seamlessly executed in corporate could fail spectacularly in cultures characterized by an open and inclusive collegial atmosphere (Cramer, 2018). Due to the number of stakeholders that must be satisfied in shared governance, succession planning is sometimes viewed as impractical (Monks, 2022). To complicate things further, "When a presidential search has a public aspect, it impacts the number of candidates" (McDade et al., 2017). Boards of directors must assume accountability, foster conditions that foster leadership development, and preserve institutional confidence (Rall, 2021; Are You Ready to Serve on a Board?, 2020; Rall et al., 2019).

Three fundamental elements must be included for academic institutions to have effective succession plans: professional (growth) development, leadership transition, and "once on board" (Jackson & Allen, 2022; Klein &

Salk, 2013). Professional (growth) development is the first element. Each institution must find individuals who have the potential to become leaders, give them training, and give them experience in the real world (Jackson & Allen, 2022). In addition, institutions (particularly their governing boards) are responsible for acknowledging that their programs will train future leaders who will pursue opportunities elsewhere (LeBlanc, 2020). The majority of governing board members are persons appointed through a political procedure. In contrast, others are chosen by the nominating committee of the board who are not affiliated with the institution. This combination can present issues for the president if the respective institution's culture favors greater board oversight (Soares Furtado Oliveira et al., 2023; Barringer et al., 2022; Baser, 2022; Schmidt et al., 2014). The second component of procedures that must be implemented, planned, or unplanned in preparation for prospective openings is the transition of leadership, by which such protocols may or may not include a typical open search.

The final crucial component, "once onboard," implies that an organization must take steps to ensure the new leader gets off to a good start (Cavanaugh, 2017; Klein & Salk, 2013). Due to the academic atmosphere and the governance system, succession plans in the higher education sector remain scarce (LeBlanc, 2020; Cavanaugh, 2017); nevertheless, a succession plan has been proven to be capable of being successfully adopted and practiced in an academic setting by a number of institutions (Selingo et al., 2017; Bornstein, 2010). There are documented cases where the success of academic institutions' effectiveness of the succession efforts has been demonstrated by the generation of internal successors who have received leadership training in advance of openings in key senior positions (Selingo et al., 2017; Bornstein, 2010).

Because of the nature of the academic setting, collective action through shared governance is required in order to arrive at the most important decisions about policy (AAUP, 1966; AGB, 2017). The board of directors in a public institution is the body that is responsible for making policy adjustments, as well as appointing and terminating presidents; however, they are susceptible to the political influence of state legislature, which in some cases could legally lead to an overturned presidential appointment (Johnson, 2018; Golden, 2014). Private institutions, in contrast, are not subjected to the oversight of state legislature regarding presidential appointments (Altbach et al., 2022), so presidential appointments lie squarely in command of the board of governors. Organizations must overcome many important issues that may lead to the failure of succession planning in order to reap the benefits of the strategy (Ahmad et al., 2020).

Tendencies in policies and practices of institutions of higher learning have frequently inhibited minority access and opportunity in higher education, as indicated by the persistently low proportion of minorities in leadership positions (Townsend, 2020; Advancing Diversity and Inclusion in Higher Education, 2016; Wolfe and Dilworth, 2015). In addition, articles further explain minorities are underrepresented at all administrative levels due to interruptions in the educational pipeline, unsuccessful recruitment and retention initiatives, and unfriendly settings devoid of meaningful pathways (Campbell, 2021; Chance, 2021; Wolfe and Dilworth, 2015). Many institutions have statements and policies about diversity and inclusion, but the willingness to confront the issues of racial bias within institutions still wains (Edmondson et al., 2021; Jones & Kee, 2021; Jones, 2020). This avoidance of the problem with empty policies leads to an internal degradation of self-worth or value for employees and undermines the psychological safety of minorities (Chun & Feagin, 2019).

The significance of a psychologically safe work environment and inclusivity in which employees feel comfortable expressing their genuine selves without fear of being labeled as inferior or incompetent is necessary when increasing diversity in the workplace (Nishii & Leroy, 2022; Ward et al., 2022). Institutions must exercise cultural competence, as it requires correctly and exhaustively examining one's current views versus contemporary practices, which can be uncomfortable, especially as it involves minority leadership (Washington, 2020; Chen & Yang, 2019). Although there has been an increase in diverse representation in leadership roles in higher education, most people working in the industry would agree that the sector is not yet where it needs to be. To begin, boards of trustees have a responsibility to be aware of the problem and to consider alternatives to the conventional and well-trodden paths of the past (Finkel, 2019).

There are a generous number of leadership programs for minorities at colleges and universities because institutions recognize that the success of an organization can be increased when current leaders take responsibility for mentoring and training potential future leaders within it (Bradley & Mead, 2022; Moore & Wand, 2022; Torrens & Floyd, 2017). For stakeholders, including the larger community, the lack of minority leadership participation raises concerns about the institution's lack of commitment to diversity in the absence of actions to support it (Vanclay & Hanna, 2019). In addition, a lack of racial and cultural diversity in leadership puts doubt on an institution's capability to handle continuing changes and the alignment of a student body that is becoming increasingly diverse (Briscoe, 2022; O'Meara et al., 2020). The lack of diversity among leaders poses both a challenge and an opportunity. If leadership diversity is established, these new leaders may bring with them new cultural lenses, a dedication to diversity, the ability to relate to varied constituencies, and new perspectives on the difficulties that students face (Cheung & Gong, 2022; Chanland & Murphy, 2017).

Diversity in colleges and universities should foster a good attitude toward accepting, embracing, and ultimately respecting differences, which develops into the practice of valuing all individuals (Briscoe, 2022; Patton et al., 2019; Bauer & Clancy, 2018). This approach translates into enhanced access and inclusion, laying the groundwork for the formation of a community that promotes learning and growth for all of its members, and it does so by offering equal chances to all members across generations (Bernstein et al., 2020; Ainscow, 2020; Wolfe & Dilworth, 2015). Campus culture will continue to change for years to come, which may present significant difficulty in fostering a cultural shift towards diversity in a university context (Chun et al., 2018; Wolfe & Dilworth, 2015).

Method

The study employed a qualitative approach to examine the perceptions of governing boards at 4-year public Predominantly White Institutions (PWIs) regarding presidential succession plans. The choice for a qualitative approach was informed by its ability to capture real-life, subjective insights from individuals, making it more suitable for this study compared to quantitative methods. This approach helps understand individual reasoning, attitudes, and motivations, as opposed to just numerical data. The qualitative research methodology used was designed to reveal participants' thinking and attitudes towards succession planning, going beyond what researchers believe or what existing literature suggests. Data was collected primarily through in-depth interviews, a method that allows for comprehensive individual insights into a specific concept or situation. This qualitative study aimed to deeply understand the perspectives of governing boards on presidential succession plans at PWIs, leveraging in-depth interviews to gather data and identify trends in participant ideas and beliefs. This methodology enabled the researchers to better comprehend the core concerns of the study, which would be challenging using a quantitative approach.

Site Selection and Population

The study sites were two, four-year (PWI), public institutions in Mississippi and Tennessee. Based on examining institutional characteristics, the researchers identified two institutions with significant minority populations. As this study focused on minority succession planning, it was important to consider the growing racial landscape of the institutions for selection purposes, as it would provide a range of perspectives for the study. Institution A enrolled a student population comprised 28.54% minorities, of which its total full-time faculty, 23.5% were minorities, 28% of the staff were minorities, and 8% of its administration were minorities. Institution B enrolled a minority student population comprised of approximately 52.3% of the total student population. Of its full-time faculty, 27.7% were minorities.

Sample Selection

A purposeful sampling strategy was used to identify study participants from institutions A and B. The purposeful sampling strategy involved drawing a sample from the portion of the population that met selection criteria. Sample inclusion criteria included (1) Holding or have held governing board membership; and (2) participation in a presidential selection process. The researchers utilized gatekeepers and institutional documents to identify current presidents, chairs of boards, and state-wide education commissioner offices to develop a sampling frame.

The study sample included current or former governance board members of predominantly white institutions who had been involved in selecting institutional presidents. These leaders were likely most intimately familiar with institutional current search committee participation and presidential selection processes. The sample consisted of 14 participants who met sample inclusion criteria. Participants were interviewed until saturation. In other words, this study reached saturation when continued sampling and data analysis yielded no new information (Creswell, 2019).

Data Collection

Data were collected through interviews. Each identified participant received a study summary and a consent form to review and sign. The consent form was emailed to the participants for them to read and sign to demonstrate that they had been informed about the study and were willing to participate. Following consent, each study participant received an email with additional information on the interview logistics. Interviews were scheduled at a time convenient participants using the Zoom platform.

Using open-ended questions, the researchers conducted one, in-depth 60-90 minute interview with selected individuals to elicit responses. Each interview was broken into three sections. The first component concentrated on the historical/biographical elements of the interview, which provided context for participants' lived experiences. The second component focused on the actual presidential selection or succession process, as experienced by each participant. The final component allowed participants to reflect on their selection/succession experiences and being a board member.

Each participant completed a closed-ended demographic survey. Among the demographic questions that were asked were the position, number of years spent working on boards of directors, years spent working in academia, race, and gender. Afterward, the researchers conducted in-depth interviews. The researchers used open-ended questions to address more general philosophic notions but utilized more pointed questions to delve deeper into clarifying responses or expounding. As required, more follow-up and clarification questions were asked. The duration of the interviews ranged from 60 to 90 minutes. Data were stored and secured on a password-protected drive, accessible only to the researchers.

Data Analysis Procedures

As indicated by Seidman (2019), the data were created discreetly to conceal identities of participants (p.131). Personal Identifiable Information was stored in an encrypted or password-protected device. Each participant was assigned synonyms. Interview transcripts, field notes, and other acquired data were organized by color coded labels and assigned identification codes. The data adhered to Creswell and Guetterman's (2019) "Six Steps in the Process of Analyzing and Interpreting Qualitative Data", which included preparing and organize the data, coding the data, building themes, reporting findings, interpreting findings, and validating findings.

1. Prepare and Organize the Data for Analysis - The researchers collected data through interviews and field notes. The interviews were then transcribed manually and using a transcription service. The transcriptions were cross-checked with the audio recordings for accuracy, and the interviews were condensed by removing duplications and irrelevant remarks. 2. Explore and Code the Data - The transcripts were read multiple times for familiarization. The researchers coded the data by reducing the text to descriptions and themes and assigning a code label to each text segment. 3. Coding to Build Description and Themes - The coded data was used to create descriptions and themes. A process of collapsing and combining codes was used to form broader themes, which were structured to develop a narrative of the study. 4. Represent and Report Qualitative Findings - The findings were discussed in a narrative form, which included a timeline, questions, and commentary on observed changes. Visual aids like figures, diagrams, and tables were used to effectively depict the results. 5. Interpret the Findings - The researchers interpreted the major findings by presenting personal opinions, comparing the results with existing literature, suggesting areas for further research, and identifying study limitations. 6. Validate the Accuracy of the Findings - The researchers conducted member checking to ensure the accuracy of the participant's responses, providing an opportunity for participants to confirm the accuracy of the qualitative report.

Description of Participants and Sample

Study participants represented a diverse group of 14 individuals who held or had previously held board membership positions and had been actively involved in a presidential selection process. The diverse governance experiences of study participants enhanced the study, as some participants had experience with centralized and decentralized higher education governance boards. Participants represented a range of professional backgrounds with experiences spanning corporate, government, and higher education leadership roles. Table 1 provides a summary of the demographics of study participants.

Table 1 - Participant Demographic Data

Pseudonym	Ethnic Designation	Gender	Board Model	Experience	Primary Experience	Institution
Anthony	Majority	Female	Centralized		Corporate	B
Dennis	Majority	Male	Centralized		Corporate	B
Griffin	Majority	Female	Centralized		Corporate	B
Leon	Majority	Male	Both		Corporate	B
Klobnak	Majority	Female	Decentralized		Corporate	A
Randall	Minority	Male	Decentralized		Corporate	A
Paschal	Majority	Male	Centralized		Education	B
Young	Majority	Male	Decentralized		Corporate	A
Arnold	Majority	Male	Decentralized		Corporate	A
Emilio	Minority	Male	Decentralized		Corporate	A
Taylor	Minority	Male	Both		Corporate	A
Michael	Minority	Male	Both		Corporate	B
Season	Minority	Female	Centralized		Education	B
Ward	Majority	Male	Centralized		Corporate	A

Phenomenological Analysis

The study participants provided a wealth of information to the interview questions. The data gathered during the interviews with study participants were compared to the STOC framework. Through the lived experiences and

perceptions of the study participants, 14 themes emerged from the interviews with the board of trustee members in response to the four guiding questions.

These themes provide insight into the perceptions, attitudes, and potential strategies of board members in relation to succession planning and the adoption of minority presidential positions in universities. This part of the chapter is organized into sections consistent with the order of the research questions (by stage): 1. Awareness or solution to the problem 2. Adoption 3. Implementation 4. Institutionalization. In each section, related research questions are addressed, followed by analytical comparisons and discussions pertaining to scholarly literature. The first part will summarize the findings by theme, followed by the second section, which dives into the analysis of the findings, again by theme.

The 14 participants in this study provided detailed responses to a range of questions formulated to delve deeper into factors influencing the presidential search process as applicable to minority presidential candidates. Responses provided valuable data to systematically analyze and identify emerging themes. Lived experiences and perceptions of participants were instrumental in identifying emerging themes related to succession planning for institutional presidents focusing on minority selection.

Thematic analysis was conducted based on participant responses to four research questions. The following study research questions were designed to explore:

1. The role of governance structures in the presidential selection process, with an emphasis on how centralized and decentralized systems may influence minority candidate selection.
2. The factors and criteria board members consider when selecting a university president, specifically in promoting diversity and inclusion within higher education leadership.
3. The perceived challenges and opportunities faced by minority candidates during the presidential selection process, as well as any institutional strategies or initiatives aimed at addressing these issues.
4. The potential impact of minority presidential selection on the overall culture, performance, and reputation of higher education institutions.

Thematic analysis of the participants responses was conducted highlighting the key findings and insights emerging from the data from assessments of participant responses.

RQ1: What are the perceptions of board members in facilitating awareness and solutions to the adoption of succession plans for minorities as university presidents?

Data were analyzed to gain insight into the perspectives of governance board members concerning awareness and recognition of an evolving retirement landscape in selection of senior leadership in higher education. The analysis identified potential problems and solutions to current issues within a presidential selection process. Such understanding is essential in helping institutions prepare for challenges and opportunities present during leadership transitions. The research examined specific qualifications, characteristics, experiences, and orientations prioritized by board members in filling the presidential position. By understanding preferences, higher education institutions can better focus on developing and recruiting leaders who possess desired qualities, ensuring seamless transitions and continued success in the changing educational landscape.

Theme 1: Ideal President is Not Primarily Academic

Interviews with the board members indicate that the role of the president is primarily external-facing and less of an academic function as historically theorized. Participants indicated many selection processes get stalled because of focus on academic achievement in the narrowing of candidates. The thematic responses of the board members reflect an awareness of the need to challenge traditional notions of what makes an ideal university president to facilitate the adoption of succession plans that are more inclusive and supportive of minority candidates. Most respondents concurred that university presidents were expected to act as the institutional public face, engage in fundraising activities, and maintain strong relationships with external stakeholders rather than focus on the academic aspects of the institution. Trustee Leon said,

The faculty represent the programming of the school. But they do not run the school. That body is a group of almost independent practitioners, if you will, skilled in their own space who do a wonderful job, and they are the program, and that's why you [go to the institution]. But in terms of organizing the strategic direction of the university, allocating the resources, raising the resources, etc., they are not the most important, in my view.

Participants indicated presidents are responsible for managing a complex and multifaceted organization requiring skills that may not necessarily be developed from a purely academic background. They believed individuals with experience in management, finance, and other relevant sectors can bring valuable insights and skills, potentially leading to more efficient and effective leadership. Trustee Paschal stated "The job of the president is 99% external. The single most important thing is the budget. It's finances, and there are three sources of revenue. Tuition and fees, externally funded research or activities that are kind of contract based at the State." According to the respondents, university presidents are increasingly responsible for securing funding and resources for the institutions. This requires communicating with donors, government agencies, and other external partners. As a result, participants felt successful candidates must be adept at navigating the external landscape and promoting the institution's image and

interests, which often takes precedence over academic matters. As Trustee Taylor reflected on his tenure as a trustee, he said,

You got to have somebody with fundraising capabilities. If the money's not right, nothing else is going to matter. They have to have fundraising capabilities. And I'm putting that before their academic credentials because the reality is I've seen presidents be just fine that did not have a whole lot of academic credentials. I've seen the highest academic credential presidents fail because it's not about their academic credentials.

Many participants indicated the president must have effective social skills to manage all institutional constituents, including faculty, staff, students, alumni, donors, and the larger community. Participants highlighted in today's highly competitive higher education landscape, a university's reputation plays a major role in attracting top students, faculty, and resources. University presidents are tasked with maintaining and enhancing the institution image in the public sphere, engaging with media, and responding to external events or crises. "[Presidents] need social skills to navigate the many and often intersecting terrains. Trustee Edwards stated,

They will have many eyes on them, along with complex demands. It's so much social hosting goes on with this job. The president is never alone. It's always something. Somebody pulling on and pulling on you, tugging on you, wanting this, wanting that. But you have to be somewhat of a politician to be in this job, offered Trustee Randall.

Participants felt university presidents often need to engage with local, state, and federal government officials to advocate for policies and funding that benefit their institutions. Participants noted this requires them to have a deep understanding of the political landscape and the ability to build relationships with key decision-makers, a decidedly external responsibility. Trustee Taylor stated,

The ability to raise money, social skills to be able to navigate the alumni base and the political atmosphere in the State. If you cannot navigate the alumni base, it will not work. If you cannot raise money, it will not work. If you do not have the respect of the faculty staff, you can get by with that, and they will. If you have good leadership and you can raise money, and you can manage things socially, they will forget about the academic credentials.

Participants indicated that the university president was also responsible for creating strategic partnerships with other higher education institutions, industry partners, and international organizations to foster collaboration and drive innovation. The successful candidate will be able to focus on external relationships and networking. Trustee Edwards noted, "We needed a president that understood what kind of relevant job skills that the university could help kids achieve. You know, and that's reflected in our new strategic plan. We want to be able to be a university that can help staff [our local companies]". While academic leadership and the oversight of the institution educational mission remain essential aspects of a university president's role, the study reveals that the primary responsibilities of modern university presidents are external-facing. This shift in focus acknowledges the increasing importance of securing resources, managing reputation, and cultivating strategic partnerships in the success of higher education institutions.

Theme 2: Risks In The Current Process

Participants indicated that hiring, managing, and evaluating a university president in public was difficult due to the need for confidentiality, maintaining a competitive advantage, enabling candid discussions, avoiding external influence, preventing misinterpretation of information, and managing time and resource constraints. They felt this contributed to a smaller and less competitive pool of applicants, recently. The assumption made by the board members is that open and public forums create issues in attracting top talent. This assumption indicates that the board members are aware of the potential risks and challenges faced in the current process of selecting university presidents, particularly for minority candidates.

Impact on current employment was another concern expressed by participants. Talented candidates may hesitate to apply for fear of straining relationships with their current employers or colleagues. As noted by Trustee Anthony, "Because of the public nature of [a search] once you get to finalists, some people won't even put their name in the hat. This is because they feel like it hurts them if it goes public and they aren't selected. Especially if they're from another university.

The public nature of the search might create tension, leading to potential negative consequences for the candidate, such as damage to their reputation or job security, according to the findings. Participants felt when hiring a university president, board members needed to maintain the confidentiality of the candidates, especially during the initial stages of the process. Confidentiality was seen as essential to protect the privacy of the individuals being considered, some of whom may still be employed at other institutions. Participants believed publicly sharing information about candidates could potentially jeopardize current positions or professional relationships. Trustee Michael added,

You're not going to always get your best candidate unless we can shield candidates to a great extent. And for many minority candidates, that consideration is a reality. A tremendous minority candidate will tell you, I'm not putting my name in if I have to go through a public process where I don't have a job.

Participants also described how open, public searches could attract media attention which might lead to unwanted scrutiny and speculation about the candidates or the board. Public searches, they felt might deter top talents from applying,

as potential candidates may not want to be subject to such public examination and robust conversation amongst board members. Trustee Paschal said, "Most of them [trustees] really keep their cards close to the vest. You know because our meetings are public. They don't want to say anything that makes the [newspaper], and I've done that two or three times [myself]". He explained how some laws and policies make it difficult for members to discuss, debate, and have real, honest dialogue.

Lengthy search processes were another area of concern that participants indicated as a result of searches conducted to find the next president. According to participants, public searches often take longer due to the need for transparency and public input. These lengthy processes can discourage top candidates, who might opt for more expedited opportunities, and disrupt the campus activities or initiatives. Trustee Emilio noted,

An abrupt vacancy in the presidency can be very disruptive. Normally it has taking us six months to a year to go through the process of picking another president. So, during that six months, if you'd need a procedure where this group would continue in the same direction unless something compelling were going on.

Board members indicated that when managing and evaluating a university president, they need to engage in candid and sometimes difficult discussions about selection, performance, strategic direction, and long-term planning, which is challenging to do in the open. Trustee Griffin believed that having candid conversations with the president can be very challenging. She said,

Managing the performance and hiring in the public eye is [difficult]. What you want to be able to do is have honest conversations. Give feedback. Share. You can't do that in a public setting. It's just impossible. It just becomes a spectacle. So, therefore, everything is curated.

President selection discussions may involve sensitive topics or confidential information that should not be disclosed publicly, according to some participants. Openly discussing these matters could damage the reputation of the president or the institution, undermine trust among the board, and make it challenging to address issues effectively. Trustee Young emphasizing the current process said, "It's just hard to keep things confidential."

Participants suggested current process of public searches also lend itself to external factors in hiring. Participants expressed, publicly discussing a university presidential hiring, managing, and evaluation exposes the process to undue influence from external parties, such as donors, politicians, or special interest groups. These groups may attempt to sway the decision-making process to suit their own interests rather than what is best for the institution. "The presidential [selection] just comes with such emotion. It's so many different constituency groups that you have to try to appease", said Trustee Randall.

Theme 3: Succession Planning Not Discussed, But Viable

The study revealed that minimal to no conversation had taken place with the current administration regarding succession planning. "I don't recall succession [being discussed] while I was there. We just planned, or we had a procedure for selecting a president once a vacant occurred.", offered Trustee Emilio. "How you would do a succession plan [in higher education] is something I haven't given a lot of thought to", said Trustee Young. Trustee Anthony said,

We would have to be more intentional around that [succession]. But I don't know when I think back. There hasn't been a discussion specifically about a succession plan internally for the president. And as I'm thinking about it, not even a succession plan for his next in line.

Despite the lack of dialogue, participants agreed that succession planning was a critical aspect that should be explored within higher education organizations. They emphasized the importance of incorporating this practice into multiple layers within the organization and prioritizing diversity as a critical factor when identifying potential candidates. They also believed succession planning was crucial for their institution's continued success and growth. According to their experiences, effective succession planning ensured that the institution had a pool of qualified and capable candidates ready to step into leadership positions when they become vacant, enabling a seamless transition of responsibilities. They also noted that succession planning would promote stability within the organization, maintaining the confidence of stakeholders, faculty, staff, and students in our ability to navigate change. Additionally, participants felt that succession planning encourages professional growth and development, fostering a culture of mentorship and knowledge-sharing among leaders. Trustee Randall said,

It's so "helter-skelter" with these administration changes. It's a problem. If you could come up with a way to have two or three people who are able to do the job, or at least are familiar with the intricacies of each university, that would just cut down on a lot of these unnecessary expenditure of funds with search firms and all this kind of stuff. It keeps a smooth transition for the faculty, staff, and students. If you can have somebody in that role, [acknowledging] this person has been here, he loves the university, she loves the university, it would just be a natural step up. I think that's the way it should be. I just never really thought about [succession in higher education]

until you posed that question to me. And particularly watching the way these last few searches have gone. It's like we started from scratch [each time].

By being proactive in succession planning, respondents felt the institution would be better equipped to address the challenges of the higher education landscape, safeguarding the university's reputation and long-term success. Trustee Klobnak said, "Succession would help if an interim was already in a succession plan, and potentially would eliminate possible complications of continuity". Participants believed that in higher education, effective leadership was vital in driving the institutional vision, mission, and goals. By engaging in succession planning, higher education institutions could identify and develop a pool of qualified candidates to take on leadership roles when the need arises, ensuring continuity and stability. And considering a minority as part of a pipeline, Trustee Anthony said, "I think whether it's a minority-majority university in terms of the student population or not, there are huge benefits of making sure that we continue to have more minorities and as presidents of universities".

The general sentiment of the participants was that effective succession planning ensures that the university would have a pool of qualified and capable candidates ready to step into leadership positions when they become vacant, enabling a seamless transition of responsibilities. Further, they argued succession planning promoted stability within the organization and maintained the confidence of stakeholders, faculty, staff, and students in navigating change. Trustee Arnold summarized this general sentiment, "I think there is a great benefit to try to find and help in your search by having a legitimate heir, or successor in transition."

Lost productivity was an area noted by participants describing a new look into the current search process needs to be examined. As Trustee Leon points out,

Can you imagine the momentum that is lost? And so, if this is a systematic part of higher education, governance, and leadership selection, and if the average American university president stays in the role for six years and we have an interim every six, you do the math. Eighteen percent of the time, our colleges are led by somebody just keeping the seat warm. So, I think that I'm sure there are a lot of historical reasons, but to me, it does not make a lot of sense in the world in which we live today.

While most participants saw merits in succession planning to choose the next president, they overwhelmingly emphasized that the process, which included succession, should not preclude the board from entertaining external candidates for the role.

RQ2: What are the perceptions of board members in the adoption of succession planning as a new standard for minority presidential positions?

The purpose of this question was to provide a context for the complexity of implementing change in minority presidential succession within higher education institutions. This complex process necessitates not only the development of supportive policies and allocation of resources but also a thoughtful approach to shared governance and change management at various levels - campus, board, and community. Participants suggested that by prioritizing minority succession and fostering a diverse candidate pool, boards can help drive meaningful progress toward increased representation in institutional leadership.

Theme 4: Diversity, Second to Qualifications

Interviews revealed that the primary responsibility of the board of trustees was to identify and appoint the president of the institution. As indicated by the responses, the primary role of the governing board is selecting the best, most qualified candidate for the job regardless of ethnic status. Interviews with the participants indicated an almost unanimous consensus that the most qualified candidate should be selected, regardless of racial background. However, attention should be given to ethnic diversity. Respondents underscored board member responsibilities to uphold meritocracy and diversity in the selection processes. When pressed, there were challenges to this line of reasoning. Trustee Taylor said,

The selection of a president is frequently influenced by factors other than merit or qualifications. Political considerations have been observed that often play a significant role in these decisions. Moreover, it's common for the most qualified candidate to be overlooked in favor of someone else during the appointment of a president.

Participants expressed an increasing awareness of the value of diversity in leadership positions in contributing to the board commitment to selecting the most qualified candidate and on search firms to produce a diverse slate of candidate. Participants from Institution B indicated that the committee mandated a diverse slate of candidates, inclusive of race. Trustee Anthony recalls,

Our search committee absolutely said we wanted a diverse slate of candidates. And so, that was made clear to the search firm and the search committee. If you only have a diverse slate of candidates and you don't have a diverse panel or search committee. That's not going to work. So, I think it's got to be both.

Many participants indicated having regular conversations about the presidential cabinet to assess the organizational diversity of thought and composition. They felt a diverse leadership team contributed to varied viewpoints and

experiences, enriching decision-making processes, enhancing problem-solving abilities, and promoting a more inclusive university culture.

Participant responses and body language suggested selecting a candidate based on race could inadvertently lead to tokenism or undermine the perceived legitimacy of the selected president. They believed prioritizing candidate qualifications and ability to lead the university, the board would ensure their choice was respected and supported by the university community. Trustee Young said,

Now, if a school decided on the front end, we want our next [president] to be a diverse candidate. Then [the board] would just select the group that were diverse candidates. And now that's a little different because now you've said I place diversity first as opposed to best first. Where best to me doesn't mean not diverse, but it doesn't always mean diverse.

Theme 5: Board Must Embrace Diversity

The participants recognized that considering diversity was a critical aspect of succession planning and that higher education institutions can foster an inclusive environment that respects and values differences among individuals but collectively stopped short of expressing ethnic diversity as a primary consideration versus diversity of thought. As Trustee Taylor indicated that to adopt minority succession, "you're really going to have to have a board that values diversity," to which he questioned the sincerity of the State to support the board. Prioritizing diversity in succession planning also sends a strong message to the entire organization about the institution's commitment to inclusivity and equal opportunity, according to the participants. Trustee Young stated, "I do think if you don't have diversity today in your institution, and don't articulate that diversity is one of your core values, then I believe you're setting yourself up for failure." Participants repeatedly mentioned the diversity in the pipeline of succession. Trustee Klobnak said, "[the board has to] start looking at a pipeline for each university and consider diversity in that pipeline." Trustee Arnold stated,

Each school should have representation based upon the population of this state. I strongly believe that. And diversity is great for an institution having different roles, different viewpoints, different abilities is so important. That would be a callous mistake on our part if it were to be ignored or thrown away. I would have no problem at all if the minority was the president. If he was both qualified, the best person bar, I'd be the greatest champion.

Theme 6: Shared Governance Does Not Mean Shared Accountability

When asked if the adoption of succession planning would pose any opposition through the shared governance system currently in place, responses were mixed. While some participants believed there might be opposition, they were not necessarily sure of what the opposition would look like. Most responses may be summed up best by a statement made by Trustee Griffin. She said,

I would think that it would be embraced. I think it's just it's just a change. I think it's more of it's just a change that is healthy. And I think, you wonder why we end up where we get to [in our decisions]. I don't think it's an accident. Part of why we are where we are in higher ED is because of an unintended consequence of shared governance. I don't think it's a deliberate consequence of shared governance. I think shared governance is a beautiful thing, and I think it's something that the business world could learn from academia, more shared governance because it's more engagement. You have a say. You have a seat at the table. It's meant to be versus just an autocratic [system]. Where there are a few people at the top who decide everything, and you just have to get along or find a new job. But I think the shared governance that has created this unintended [idea] that it is the shared responsibility. When at the end of the day, the "top of the house" leadership, the only people who can do it, or whoever is in charge [to make the final decision], is boards of trustees per, the mechanism in higher ed.

Respondents felt a representative voice in decision-making was needed. Participants felt the major concern was accountability. They felt that faculty input as essential to the selection process. Trustee Paschal said,

In a shared governance model, the faculty have, not just the voice, but the faculty IS the university to the extent that the university's job is to award academic degrees. That's [the faculty's] job. All other areas of operations are essentially inconsequential to the faculty. Shared governance means [the faculty] is the boss.

Participants overwhelmingly agreed that the final decision in selecting presidents remained with of the collective board.

Theme 7: Amended Policies and Transparency

When asked about policies needing adjustment to accommodate succession planning for minorities as presidents, board members had varying opinions. Most were unsure of what policies directly influenced their responsibility to select the new president. Still, many indicated that policies to support the idea of succession within the organization needed to be established. To change policies, participants felt the board staff and potentially general council would need to assist in the discovery, presentation, and review of suggested changes. As Trustee Randall said,

Pulling out the current policies and just hammering them. I mean, go through it line by line and see what's in the current policies that could be kept. So, let's not recreate the wheel entirely and try to meld this new succession plan into what's already preexisting. Because if there's a framework, it provides some structure, and you can use it.

There was variation in how Trustees of Institution A would handle policy changes versus those of Institution B. Institution A reported they had a little more privacy and autonomy needed regarding deliberating the policies that may need changing. As Trustee Klobnak described the process,

For a new policy, we would discuss it around the board table, usually in an executive session, depending on how sensitive it is. Get buy-in from the board. Someone from the board can help with this, or usually the staff does a lot of the work. Our legal staff, for sure. And they would come to us with a written suggestion of what this policy would say and how it would work, and we would then review it. We'd usually have the next month to come back and discuss it further after we've had time to review it, and then we might tweak it and change it. And then we have a discussion, and then we end up voting on it. It's voted up or down, and then it would be included once it's approved, included with the rest of our policies managed by the staff and the commissioner, and followed by the board going forward.

Trustees from Institution B discussed the changes needing adjustment. They recommended a more open, public availability when discussing policy changes. Others cited the open meetings requirement as a possible obstacle to progressing in deliberating or making tough decisions. Trustee Paschal indicated he has shut down a few times because of the open meeting requirement, and because of the "Open Meetings Act, nobody will say anything. We don't discuss and debate so forth. So, it's odd." Trustee Griffin spoke about having open meetings during the last presidential selection. She said,

It was the craziest thing I've ever witnessed. The selection of president represents the single most significant choice that we must make. And the board of trustees that I was a part of was unable to deliberate or discuss the matter amongst ourselves. With sunshine laws, you can't have these conversations about people and careers in a public forum. They're confidential because they should be. It's not fair; it's not right; it's inappropriate. So that kind of ties your hands because you're not allowed to deliberate outside of the public purpose. So even if we wanted to have that conversation, we're precluded.

Participants expressed an understanding of the duty to the public and transparency but pondered adjusting laws and policies to provide the most privacy for candidates and still meet the needs of the communities served. There was agreement that universities should operate within a legal and regulatory framework, which can limit the ability of the board to make sweeping policy changes. Trustees noted they might not be aware of all the constraints and may not know which policies can be changed without violating legal or regulatory requirements, which may be institution or government connected.

Theme 8: Role of Current President

Participants agreed that the current president would absolutely have to be involved in successful succession planning to succeed. Trustee Emilio identified one issue that would arise if the current president was involved in succession planning: a vote of no confidence against the current president. He said,

I think you might have some issues there because I think when the Senate votes with no confidence about the current president, his second person in charge will probably have that same type of vote. I think your [faculty] might want someone new to come in, not the same type of person. If you [faculty] won't vote for the president, the vice president will have a hard time. Trustee Young added,

I would imagine that there would be some concern among university groups that the person in command will always be able to choose their successor and deny opportunities to those with opposing viewpoints on any given topic. Therefore, if you had a conservative school, you would remain conservative, and if you had a liberal school, you would remain liberal or choose any topic or subject that may be significant to that community. In some respects, that is not terrible.

Participants indicated they would need the president to have an active role in growing or cultivating the next set of leaders in the succession process. Trustee Ward noted,

[The board] would look at a vacancy, and then the current president would tell you who the top people were because the board wouldn't know unless they worked with the board before. The board doesn't meet with them regularly. There's no way we're going to know all those people. Participants indicated the president would first ensure a transparent and inclusive process for selecting their successor.

Participants believed the current president should collaborate with the board of trustees, faculty, staff, and student representatives in establishing a search committee, setting the criteria and qualifications for the ideal candidate. They felt the president should facilitate a smooth transition by actively engaging key stakeholders, guaranteeing that the institution's mission and strategic goals remain at the forefront. He/She should mentor and prepare the incoming president, sharing insights, experiences, and critical relationships, thus empowering the successor to tackle future challenges and opportunities, according to participants.

Trustee Ward felt mentoring was a critical element for a minority president in a predominantly white institution. He said, citing "giving everybody an opportunity and reaching down and kind of help those who haven't had the experience understand what is expected so they can grow and develop. So, they'll be prepared." Similarly, as Trustee Edwards said,

The board should encourage and take a real leadership position; tell our president we think this is important and that we want him and his staff to encourage mentorship to bring a more diverse group of individuals to the front. Now I think that that may be a way to get at it. Maybe there should be a national organization of mentors for diverse candidates for administration.

Participants indicated that the outgoing president should demonstrate a commitment to the long-term success and stability of the institution through involvement in succession planning. For this to have merit, a commitment to diverse development and succession was needed. Participants felt succession planning should be included in the evaluation of the president. Trustee Taylor said,

It's going to have to be in their evaluation. Otherwise, they won't [do it]. It's not part of the score. So, they're not going to pay attention to it. It's one thing to have a policy. But the policy has got to have teeth to it. We have a whole lot of policies, and nobody follows them because there's no teeth to them. The only reason [the board] follows the financial metrics is because it was part of their evaluation.

RQ3: What are the perceptions of board members in modifying current systems, policies, and organizational structures to accommodate succession planning for minority presidential positions?

This question aimed to understand the critical role that board members play in facilitating minority university presidential succession planning and recognizing the necessity for changes in procedures, policies, and organizational structures. They understood that adjustments to local and state policies, financial resources, staffing, and training may be necessary for successful implementation. Additionally, board members explored the need for additional roles and support for minority presidents and the importance of refining communication channels and protocols. Through these efforts, board members actively promoted diversity and inclusivity in higher education leadership, which will be explored in greater detail throughout this section.

Research findings suggested that most board of trustee participants felt there some modifications was needed to current systems, policies, and organizational structures to accommodate succession planning for minority presidential positions. Most participants agreed that the changes would be a directive from the board to the current president to implement a succession plan specifically targeting and encouraging the development of minority candidates for leadership positions. To accommodate the request, they felt it may take a new approach to human resources for the needed support to change the selection process. Such action could proactively work towards building a more diverse and inclusive leadership landscape.

Theme 9: Multi-layer Succession Planning

Study participants emphasized the importance of adopting a comprehensive approach to ensure a smooth and effective transition of leadership roles. They suggested that succession planning should be broad and deep, encompassing not only top-level administrators but also faculty and staff. They further explained the approach to succession planning would involve considering various positions and departments within the university, including academic, administrative, and support roles. Trustee Anthony said,

Instead of just talking about succession planning at the presidential level, I think you actually get more buy-in if we talked about succession planning as an important tool at the top two or three levels. Because I think, then you could build a fairly robust process. That's important.

Participants expressed the desire to ensure that every area of the institution was prepared for potential changes in leadership, reducing the risk of disruptions and maintaining continuity in the operation of the institution. Trustees felt an expansive approach to succession planning would entail nurturing talent and developing the skills and competencies in faculty and staff at different levels. This process included identifying potential diverse leaders, providing them with training and mentorship opportunities, and preparing them for future leadership roles, as noted by the researchers. According to participants, universities can ensure a smooth transition when key positions become vacant by developing a pipeline of capable and well-prepared individuals. Trustee Young described developing a diverse pipeline by stating,

If you have diversity as part of your planning, you ensure you have one or more diverse candidates. I think that's an easier process. And then it would call out [qualified] candidates as they go, and you'd end up with maybe two, or if the plan would be to end up with one.

Trustee Leon drew upon his private sector experience to suggest,

The method would include an annual review of the organization's pipeline and management hierarchy conducted by the HR representative, the president, and each direct superior.

Each person, such as a dean, would have a development plan with annual updates. The president, given their role in performance reviews, should lead this process.

Participants emphasized the importance of adopting a broad and multi-level approach to succession planning in universities, as it helps maintain continuity and stability within the institution. According to participants, by including faculty and staff at various levels and across different departments, universities can create a robust and dynamic succession planning process that ensures the institution's long-term success.

Theme 10: Encouraging Talent Development

By incorporating succession planning practices at multiple levels within an organization, participants felt higher education institutions could encourage the development of their employees. They also felt this planning would allow institutions to identify high-potential individuals and provide them with the necessary resources, training, and mentorship to grow and advance their careers. Trustee Griffin stated,

The number one thing you have to do is to identify the talent early, early in their career. Then you have to get that talent sets of experiences it needs so that when the time comes, that talent is ready, and you have to be deliberate in that effort. So then you have to put mechanisms and structures in place to have that happen. And I would say that my experience so far in higher education is we do none of that. We don't do any of it. I don't know who the top talent is because the talent is transient. That's part of the problem. It's just like it's a built-in flaw with academia. You're not going to keep your young talent. They're going to leave to get what they need, and [maybe] you'll get them back later.

Participants felt investment in employee development would help retain top talent and enhances overall organizational performance.

[Talent Development] is a huge benefit when people see internal candidates get opportunities and actually get roles. [It's] a huge, huge benefit to attracting and retaining high-performing talent. They actually really will consider me because I've seen upward mobility within the organization. And I tend to think most strong organizations use a combination of both where you absolutely are developing your own talent for succession and then occasionally bringing in outside to have the best of both, said Trustee Anthony.

Participants found that one of the obstacles to minority leadership advancement occurs because recruitment and retention of talented minorities is an issue for various reasons. Trustee Paschal said that he is aware that retention amongst talented minorities is a real problem. He explains,

Assistant professors are most mobile because departments don't have merit money for raises. Because the market is so robust, highly qualified, competent faculty, especially minorities, are challenging to keep.

Trustee Arnold noted,

We must band and attract quality individuals, pay them properly, give them the responsibility to grow, and see if they can make that leap and perform the job. We must provide those chances. That's an educated workforce.

Participants also recognized the difficulties in limited career growth and long timelines. Such barriers can frustrate and stagnate dedicated, passionate faculty and staff, which leads to separation from the university.

Theme 11: Awareness of Minority President Support

Most respondents indicated that minority presidents wouldn't need additional support after securing the presidency through succession, indicating that individuals at that level should be fully prepared to tackle any issues as the chief executive. Trustee Leon responded to the question around whether minority presidents would need any additional support versus someone Caucasian by saying, "I think the president should say this is what I want and need in order to succeed." Trustee Randall said,

If it's the proper candidate, they won't require assistance. Because the proper candidate would know where they're coming. They'd know the history. They'd know it will take extraordinary efforts on their part to blaze that type of trail [as the first]. Offering extra may look as if the board didn't think that they could do the job.

There were alternative viewpoints to note. Trustees indicated that stronger protection by the board may be a support that's needed by a minority president. Trustee Michael indicated that majority presidents would not go through the same level of scrutiny as a minority president. He also indicated that because of the cultural barriers, board members would need to work to open doors more easily available to majority presidents because of familiarity and social circles. Trustee Michael felt navigating the challenges of succession and leadership in diverse contexts, particularly with a minority president at the helm, necessitates a resolute and supportive board. He felt this commitment to diversity extends beyond mere tokenism, as the board's ability to stand firm with the minority president, especially during confrontations with the State legislature, becomes a litmus test for its dedication to inclusivity. Trustee Michael said,

Especially with succession, you better have a strong board that can stand up with the person [minority president]. It's easy to stand with someone who is [majority president] as they face the State legislature. It may be a lot harder to stand with a [minority] when they are taking those hits.

That's the difference, and that's what many boards are going to have to wrestle with. Let's say you hire the first [minority] to be the president of [A or B]. How are you [the board] going to make sure this person is successful? And if you're not willing to do that, then everyone is going to have to really look at itself and say, OK, are you truly committed to diversity? Because if you're not going to do that, you're not truly committed to diversity.

Some participants felt that boards needed to work more in red states to open doors to the presidency and have access to "movers and shakers", those individuals in the state with huge funding opportunities or gatekeepers to funds. Trustee Season felt even with a seasoned professional, as a minority, the president would still need additional strategies or conversations with individuals who are more immersed in the political culture, given the current climate. Trustee Emilio felt assuming the role of president, regardless of ethnic or racial background, requires an aptitude for garnering support within the institution and the larger community; however, for a president of a different background, this task may prove more challenging, necessitating a stronger backing from the board, a strategic approach to change, and a deeper understanding of the school's philosophy and structure before initiating any significant transformations. Trustee Emilio stated,

The president's job is to develop and solidify the support for the institution. It would be harder for a minority at the institution. I think the same thing would probably apply if a white become president of one of the black institutions. [The board] would have to stand behind them. The board would have to sell that person more to the community, and that person would also be doing the same to the community and the alumni and the whole group and the faculty staff and have to have cabinet that's strong behind him. It is basically the same as any other president, just got to do a better job, do more of it. And be strategic about what changes you make and understand the underlying philosophy of the school and the inner-workings of the school. So, I think he would not be able to go and overhaul the institution and turn the direction overnight, but he or she would have to learn the people and the issues. And evaluate the foundation of the school and before you can make any real big changes.

When asked if communication or the support [for a minority president] would be a different, Trustee Klobnak felt greater attention should be given to the varied perspectives. Trustee Klobnak said,

I think you have to be sensitive about the fact that some people are going to see this as new and different. But new and different doesn't mean bad. So, I think you do. Yes, you must realize the sensitivity and be sensitive about things.

Participants also highlighted the importance of providing adequate resources and support for minority candidates in leadership positions. Some suggested mentorship programs and targeted professional development opportunities as potential avenues for facilitating the transition.

RQ4: What are the perceptions of board members in institutionalizing succession planning as the preferred standard for minority presidential positions?

Research question four assesses processes of institutionalizing succession planning for minorities. By examining factors such as identifying champions, overcoming obstacles, and creating structures for integration, the questions aim to increase an understanding of the creation of a more inclusive leadership structure. Important issues related to minority inclusive succession planning include stakeholder involvement, opposition, buy-in challenges, the role of in ensuring continuity, necessary organizational system changes, and barriers. The study also assessed mitigating strategies and board support in the evolution of minority succession planning, ultimately seeking to understand board member perceptions of success in implementing succession planning initiatives.

Theme 12: Partisan Politics May Influence Minority University President Selection.

Participants indicated that the political landscape was more conservative, and appointing a minority college president may become a subject of partisan debates. Still, most respondents indicated that they were optimistic that less politics might be in play in selecting the right person for the job. Trustee Randall said,

Nobody probably would say it [publicly]. There is only so much change [in mindset] that is going to happen. So, I think the resistance, I suspect it would be sure, but it would not be anything overt. And honestly, if the candidate was right and fit the bill on paper, I think he could go through it even if some of them were uncomfortable.

If not openly discussed, participants felt that politics influenced the success of a minority president. Most respondents indicated their boards strived to remain non-partisan and focused on selecting candidates based on qualifications, experience, and ability to lead the institution rather than by political affiliations or ideologies. However, ideologies may be embedded in multiple layers of influence within the institution, State, alumni, and other institutional constituency. Trustee Emilio from Institution A stated,

They have a very strong, influential alumni association, alumni following, and people with strong [conservative] views and love for the school. And with that in their view, they see it going in a certain direction. That, coupled

with the majority of members of the non-minority, a minority who will want to be president of that institution would have to be, I think, an exceptional leader.

Participants differed along institutional lines as to whether political pressures would influence the selection of a minority president. Institution A trustees felt the political influences were less at the state level and more at the institution level, where the alumni base was flooded with politicians. Institution B trustees indicated little direct campus involvement and more state-level considerations, as they witnessed personal pressures during their own appointments to the board seat. Implications of state-level influence have consequences for state appropriations of funds, according to participants. Trustee Season noted that some trustees felt uncomfortable with the notion that they needed to consider state politics in selecting the president. She said, "They were very troubled that we had to make this type of decision."

While significant State interference has not occurred at Institution A, the school is in a unique situation that may have future implications. The current governor will appoint all 12 board members for years to come, according to Trustees Klobnak, Ward, Young, Randall, and Emilio. Trustees pointed out government officials expressing support or opposition based on their political affiliations regarding diversity and inclusion in higher education. Trustee Anthony believed an additional concern was pushback from state legislators and unwillingness to accept a minority candidate in the role of president. Trustee Taylor said,

[Legislators] disagreed with funding a [diversity program], and they were cutting funds to another university in the State. So, you have to worry if the state legislature will accept that [minority succession] as one of your policies without significant pushback.

Trustee Michael indicated, "Politics is in play. I think more so than people realize. Because I think about one of the major things is that this [president] has to go up to a General Assembly in a red state and advocate on our behalf. "

Theme 13: Mixed Opinions On Acceptance Among Stakeholders

Findings show that effective succession planning requires support from the wider community, including local politicians, alumni, and other stakeholders. Participants said to institutionalize the change, they will need to work to engage these groups and create a supportive environment for minority college presidents, ensuring they have the resources and backing needed to succeed in their roles. Many felt they fostered open dialogues, building alliances, and proactively addressing any concerns or resistance to facilitating support of minority presidential candidates. Trustee Leon stated,

You always want to bring various constituencies along, so you wouldn't just [implement] it and say, this is the way it's going to be, you would say this is where we want to go. Your voice is what we want to hear. Now let's start with our hypothesis. Let's test it. Let's run it by various constituencies. Let's talk about how to operationalize this and how long it would take to get it done. So I think you socialize a lot, but somebody will lead.

When asked if the community would embrace succession planning as a model, the participants held mixed opinions, and indicated that the community would be on board as long as the appropriate amount of engagement and transparency occurred. There was also a belief that the local community members must respond positively, seeing the plan as a way to promote diversity and inclusion in the area, or negatively, viewing it as an unwelcome change to the institution's deep-rooted traditions. They also felt the community's reaction might influence public perceptions of the university. Trustee Griffin said,

The business community would be a no-brainer because they're practicing it themselves. They would ask, don't you guys already do this? And I think the community would embrace it as well.

Some participants felt the university alumni might have mixed reactions, with some expressing pride in the commitment of the institution to inclusivity. In contrast, others felt constituents might view the plan as unnecessary or even divisive. Alumni support or opposition may impact donations and engagement with the university, which participants articulated weights the president selection. Trustee Arnold said,

Succession planning with a minority focus as a policy would perhaps be better accepted inside the university than externally. At [Institution A], you have extremely liberal views on one side, and then you have extremely conservative views [on the other]. But there were certainly some extremely conservative groups, and I respect their opinion and their right to have it. It doesn't mean that was the right thing for the university.

Participants felt university faculty and staff reactions might be shaped by personal beliefs and experiences, as well as the perception of shared governance. Faculty support, they felt, would be available to the extent to which the faculty felt the succession plan would positively impact their work and the overall academic environment of the institution. Participants felt some faculty would see a plan as a progressive step, while others would resist change. Participants were unclear as to how to achieve a plan that would guarantee support from faculty and staff.

Theme 14: A Culture Shift Must Occur

The theme of culture shift surfaced throughout the interviews. This sentiment appeared multiple times, and participants articulated ways culture needed to shift. Participants recognized succession planning for minorities as university presidents at predominantly white institutions (PWIs), requiring culture shifts to occur within the university and throughout the State(s). Participants also indicated racism continued to exist within factions but has improved. Trustee Paschal said,

My bias is to hire someone from outside to bring a new, different culture. We've got a lot of cultural issues in terms unrelated to race and diversity. There are a lot of, I would say, kind of bad habits in terms of performance and evaluations and expectations. So, I'm kind of biased toward hiring from the outside. And therefore, the succession plan that I would like would be somehow mobilizing or mechanizing in the external search. The criteria are well-defined, so I am kind of for internal promotion, but there should always be a national search so we know what the best candidates look like.

Participants believed the State needed to review existing policies and legislation related to higher education leadership appointments and enact legislative changes to promote diversity and inclusion. This may involve setting diversity targets or providing financial incentives for institutions that successfully increase diversity in leadership. Trustee Randall suggested the legislation is a tight-knit circle with "deep roots." He said,

A lot of politicians are alumni of some of these big institutions. So, if a politician can't see [or land] himself in that job, I can't imagine bringing in a new minority to put him in a job that they thought they could just kind of slide into or that they kind of covet. So the candidate would have to be exceptional, and I think the demand from the campus itself would have to be there too. It would have to be a grassroots type of thing, where they [students and faculty] recognize themselves on the campus where the demographics are changing. With this recognition, they understand they need to head in this direction as far as the leadership of the university. If you have that [grassroots push] from the university and the data to go along with it, you stand a better chance. And then be an outstanding candidate.

Trustee Taylor added, "I'm not sure that a 12-member board at the State level can change the culture down at the Capitol House. You're talking about change in red state politics, and that's just not that's not easily done." Trustee Ward felt greater accountability was needed within higher education to successfully implement succession planning. Individuals must first be adequately trained, but they also should be self-motivated and "do it for themselves, as well." He said,

Employees must take that initiative and get the training, awareness, and preparation. Then there is the culture piece that the institution must create with the expectation that employees are aware of opportunities for development and growth. And what you do when you're in management is look out for people with leadership and decent skillset. And those are the people that you want to just start setting up to train now. They move up in organizations to take your place.

Participants indicated that board members' self-evaluations might be needed to understand what levels of authority they might need to adjust in terms of presidential selection.

Trustee Klobnak believed that a major barrier to a successful succession plan was board members relinquishing control because some might see that appointed position as a powerful position, and reducing their input in the selection process would be a major culture shift.

Conclusion

14 interviews with university trustee members were conducted to explore the complexities involved in adopting succession planning for potential minority presidents at predominantly white institutions. The role and complexity of governance structures in the presidential selection process were examined, emphasizing how systems may influence minority candidate selection. The findings revealed that, in both systems, the importance of clear communication, transparency, and equitable practices cannot be understated. The factors and criteria board members considered when selecting a university president, particularly in promoting diversity and inclusion within higher education leadership, were also scrutinized. It was found that board members expressed the importance of cultural competence, empathy, capability, and adaptability in candidates was underscored. In terms of institutional strategies or initiatives, the study revealed that active recruitment, mentorship programs, and multi-level leadership development opportunities are crucial for nurturing minority candidates and ensuring a diverse candidate pool.

The perceived challenges and opportunities faced by minority candidates during the presidential selection process were discussed, as well as the potential impact of minority presidential selection on the overall culture, performance, and reputation of the institutions. According to the participants, minority candidates may face implicit biases, limited networks, and a lack of representation on selection committees. In addition, minority candidates may face overt political and ideological challenges not readily received by their majority counterparts. However, in the minds of trustees, when appointed, minority presidents can contribute to a more inclusive campus culture, improve student performance, and enhance the institution's reputation by attracting a diverse student body and faculty.

Researchers with corporate and academic backgrounds contribute to the study's strengths by formulating queries and analyzing results more precisely. In addition, both institutional systems, which are located in red states, had recently participated in presidential selections during a period of national social unrest, which kept the topic at the forefront of participants' minds and kept the research current. There was a healthy mix of gender and ethnic backgrounds, as well as centralized and decentralized board experience, as well as corporate and educational familiarity among the participants. This research was limited to the states of Mississippi and Tennessee, with contributors willing to participate. Geographical limitations were imposed in order to maintain control over the study, accessibility to participants, and to remain within the time constraints of the study. In addition, the investigation was limited based on the researchers' predetermined criteria.

Based on the findings, the research on governance boards' perspectives about succession plans for minorities as university presidents reveals intricate aspects of their decision-making. The research, through interviews, identified 14 key themes that are recommended for further exploration. These include the challenge of maintaining transparency and privacy during presidential selections while abiding by "Open Meeting" and "Sunshine" laws. The potential long-term impact of politically appointed trustees on diversity in leadership, and the influence this might have on the university's direction and success, is another focus area. The study also addresses the effectiveness of centralized versus decentralized boards in adopting succession planning and the need to reevaluate shared governance's accountability in the 21st century. It investigates the balance of power between different stakeholders and its implications for succession planning for minority presidents. Lastly, the research examines the effect of partisan politics on university presidential selection, academic funding, and the potential implications on diversity in leadership. This deep analysis can guide policymakers and higher education institutions to develop effective strategies and explore more.

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