

# Succession Planning at a Medical Academic College in Saudi Arabia: A Mixed Research Design

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## Abstract

**Objectives:** To ensure the proper replacement and the continuity of effective leadership in all the management positions in the institute, effective succession planning should be implemented. The aim of the study was to assess the perception of the managers at various managerial positions regarding the succession planning implementation at their academic institution. **Methods:** Using a mixed research method, this descriptive, cross-sectional research was carried out at a private medical college in the eastern region of Saudi Arabia taking a convenient sample of 61 employees holding different managerial positions. An electronic, self-administered questionnaire was developed by the researchers and filled up by the participants including close-ended and some open-ended questions to assess the perception of succession planning implementation, its facilitators, and possible obstacles. **Results:** most of the participants revealed that the current managerial position is their first managerial position and that they had one to five years of experience. Most participants preferred to have a structural succession planning program with a mentor before moving to any future managerial position. Multitasking, followed by miscommunication were the main obstacles to succession planning. However, having previous managerial experience, and having friendly and cooperative teamwork were among the main facilitators of the managerial duties and responsibilities. **Conclusion:** Educational institutions generally need to develop effective succession planning for managers by designing a structural successional planning program. The greatest proportion of the participants reported that the optimal succession plan is supposed to be 4 to 6 months.

**Keywords:** Leadership, MACHS, Management, Medical College, Saudi Arabia, Succession planning.

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## INTRODUCTION

Successional planning is a broad term, which is more than the replacing plan. It is defined as the management strategy to ensure the continuity of effective leadership in all the management positions in the institute. This strategy focuses on assessing the needs to develop a program to prepare the right person to be in the right place at the right time (Rothwell, 2010). The effectiveness of successional planning is to cultivate an effective and supportive environment which will enhance the management experience for all the managers and leaders at the different management levels.

According to Trepanier and Crenshaw (2013), A strategic succession planning program may benefit

the organization by increasing the retention, increasing the engagement and improve the financial performance when the leaders are involved in discussing their career growth systematically, use networking activities to identify the next generation of leaders, create, develop, and implement a thorough succession planning process.

Ensuring effective succession planning for eligible organization workers is a rewarding process that will save the money and time needed to find an external candidate. Also, succession planning will improve employees' satisfaction and retention (Gordon & Overbey, 2018). However, research has identified some factors that work as barriers that inhibit developing succession planning, and many obstacles are still unknown. Identifying the barriers and studying the

facilitators is an important step to overcoming challenges and developing succession-planning programs.

AlHosis *et al.* (2012) proposed some factors that impact succession planning for nurse managers in Saudi Arabia. Through mixed method research, qualitative and quantitative data were collected from seven hospitals in Saudi Arabia. Two hundred and forty-five nurse managers and executives completed quantitative questionnaires, and eleven participants from the same sample participated in semi-structured interviews. The findings indicated that the participants considered the succession planning in their organization to be in the developmental stage. Also, in evaluating important manager competencies, the high responses were in communication, the scope of practice, and knowledge. Finally, education and training, strategic plan for successional planning, and motivation were the common themes in response to the questions about the required resources and the best ways to improve succession planning for nurse managers in their organizations.

Much research works had focused on the effectiveness of applying succession planning in healthcare institutes, but a small number of researches studied the effect of having succession planning in educational areas, especially in higher education institutions. Klein and Salk (2013) conducted a qualitative study to examine the degree of succession planning for the top positions in private higher education institutions. After reviewing 25 managers from different management levels, the researchers found that most of the participants reported a lack of succession planning in higher education and identified the tradition of the academy as a challenge to succession planning. Therefore, the main purpose of the current study was to assess the perception of employees at different managerial positions about the succession planning at one of the academic higher education institutions in Saudi Arabia.

## METHODS

**Design of the study:** a descriptive, cross-sectional research design was utilized in this study using the mixed research methodology where both quantitative and qualitative research designs were used to conduct the study.

**The objectives of the study:** The overall aim of the study was to assess the perception of employees of different managerial positions about the succession planning at their educational institution.

The objectives that were intended to be achieved through the implementation of the current study:

- Assess the sociodemographic characteristics of the participants.

- Identify the perception of the managers about the succession planning and its implementation in the organization.
- Explore the challenges and facilitators in their managerial responsibilities.

**Setting:** The current study was implemented at Mohammed Al-Mana College for Medical Sciences (MACHS), one of the private large educational institutions in the eastern region of the Kingdom of Saudi Arabia. The college was chosen due to the convenience to the researchers, easy access, and the feasibility to collect data there.

**Sampling technique:** The sample was recruited using the convenience sampling method. Convenience sampling is a non-random sampling method that depends mainly on the sample of subjects in hand, making the sampling process easier, faster, less expensive, and convenient for most researchers.

**Sample:** The sample of the current study consisted of 61 employees of the college which represented almost all employees who occupy a managerial or supervisory position at the institution and accepted to participate in the current study.

### Data collection tool

The data collection questionnaire was mainly designed by the researchers depending on the literature available and using previous research (Al Hosis, 2010; AlHosis *et al.*, 2012; Alomairi *et al.*, 2018; Du Plessis, 2019). This questionnaire consisted mainly of two parts, the first gathered some sociodemographic data about the participants including age, gender, marital status, years of experience, managerial position, and others.

The second part of the questionnaire gathered information about the perception of the participants concerning the succession planning in their organization. This part utilized 9 questions to reflect the perception of the participants using a five-point Likert scale ranging from (1 strongly disagree to 5 strongly agree), a question was added that asked about the optimal succession plan duration from the participants' point of view.

To explore the participant's opinion about the challenges and facilitators in their duties and performance in their managerial position at the institution, two open-ended questions were added to give more flexibility for the participants to write their inputs freely in this regard. Using qualitative open-ended questions to ask about the personal perception of the facilitators and the obstacles, more in-depth information was gained in a more comprehensive manner.

Content validity of the formulated questionnaire was assessed by sending the questionnaire

to three experts in the leadership and management field. Some items were modified, and others were omitted according to their recommendations. However, Test-retest reliability was then assessed to assure the accuracy of the questionnaire, and the correlation coefficient test showed an acceptably reliable survey (0.81).

**Data management and analysis:** The collected data extracted from Google forms were analyzed using the Statistical Package for Social Sciences computer software (SPSS V.23), where descriptive statistics were used for data analysis. Descriptive data were displayed in terms of frequency and percentages, or mean, and standard deviation. Data were presented in tables and figures as convenient. Moreover, regarding the two open-ended questions, the narrative data were extracted, summarized, and then categorized into main themes to make a description of that information.

**Procedures:** Data collection process has extended over one month (January 2022) after gaining the ethical approval to start data collection from the local ethics committee at MACHS. The data collection tool for the current study was carried out using an electronic questionnaire. The link of the questionnaire was sent through the official emails of the institution to all employees of the college asking them to participate in the study and to fill up the questionnaire if they held one of the supervisory or managerial positions as specified in the criteria of eligibility. The survey included a cover page that display the researchers' credentials, the main purpose of the study, its advantages, and a definition of succession planning. The survey was taking only 5 minutes to be filled up.

**Ethical consideration and study approval:** The research proposal was submitted to the ethics committee of the college to take the initial approval

before embarking on data collection (ethical approval number: SR/RP/73). The participants in this study were informed about the purpose of the study and its advantages before filling up the survey. Autonomy to participate in the study was guaranteed and all information is kept confidential and solely used for the scientific research. The names of the participants were not required in the questionnaire and the data were presented as aggregate data.

## RESULTS

The findings of the current study were illustrated in tables and a graph. The number of the participants in the study was sixty-one employees from different managerial levels and positions. Concerning the sociodemographic characteristics of the participants, Table 1 below showed that the age of the participants extended from 25 to 54 years, however, more than 86% of the participants aged between 25 and 44 years old.

More than two-thirds of the participants were females, Saudi nationals, and married. Almost two-fifths of the participants had master's degree (39.3%), and around one-third of the participants held Ph.D. degrees of education (32.8%). More than half of the participants occupied a supervisory management level position (57.4%), and two-fifths of the participants occupied a middle management position (39.3%), while only 3.3% were at the top management level in the college.

Once asked about the current managerial position they occupy, the greatest proportion of the participants confirmed that this was their first managerial position in their academic career (63.9%). Most of the participants reported that they had one to five years of experience in their current managerial position at the college (65.6%).

**Table-1: Sociodemographic datasheet (N=61)**

Sociodemographic data	n	%	
Age	25-34 years	26	42.6%
	35-44 years	27	44.3%
	45-54 years	8	13.1%
Gender	Male	20	32.8%
	Female	41	67.2%
Nationality	Saudi	43	70.5%
	Non-Saudi	18	29.5%
Marital status	Non married	10	16.4%
	Married	51	83.6%
Educational Level	Bachelor	17	27.9%
	Master	24	39.3%
	Ph.D.	20	32.8%
Current position Level of management	Supervisory management level	35	57.4%
	Middle management level	24	39.3%
	Top management level	2	3.3%
This is the first managerial position	Yes	39	63.9%
	No	22	36.1%
Experience in the current managerial Position	Less than 1 year	12	19.7%
	1-5 years	40	65.6%
	More than 5 years	9	14.8%

Table 2 represents the perception of the participants regarding the existence and the implementation of the succession plan at their institution. Data were assessed using nine statements utilizing a five-point Likert scale ranging from strongly disagree to strongly agree. The mean and standard deviation was measured for each statement in addition to the frequency and the percentage of the respondents for each of the nine statements. It was clear that the highest consensus among the participants was for statement number 8 which declared that they prefer to

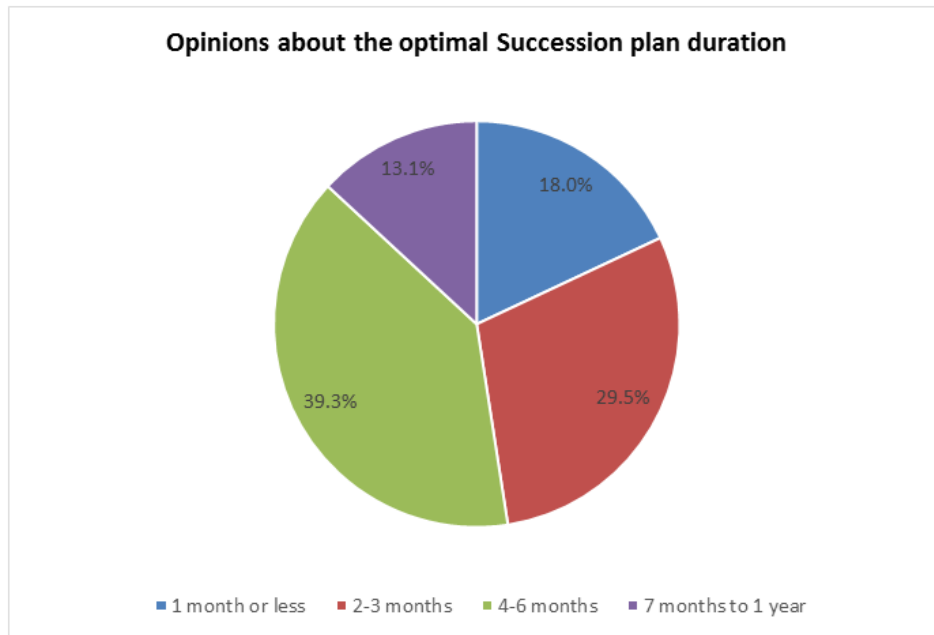
have a structural succession planning program before moving to any future managerial position. The following statement that had the greatest consensus and the highest mean was statement number 6 which reflects that it was important to have a mentor in the first supervisory management position. On the other side of the coin, the least consensus of the participants was on statement number 9 which mentioned that the succession planning program is needed only for the first management position.

**Table-2: Perception about succession plan at the organization (N=61)**

Perception about succession plan	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	M±SD
	n (%)	n (%)	n (%)	n (%)	n (%)	
1. There is a clear vision or policy about management succession planning in my organization	7 (11.5%)	8 (13.1%)	21 (34.4%)	6 (9.8%)	19 (31.1%)	3.36±1.35
2. The succession planning should be same for all the management positions	13 (21.3%)	4 (6.6%)	18 (29.5%)	6 (9.8%)	20 (32.8%)	3.26±1.52
3. I was aware about my new roles and responsibilities before I had the position	4 (6.6%)	10 (16.4%)	20 (32.8%)	8 (13.1%)	19 (31.1%)	3.46±1.27
4. I was aware about the required management skills for this position before I had it	2 (3.3%)	12 (19.7%)	14 (23%)	15 (24.6%)	18 (29.5%)	3.57±1.20
5. I had enough leadership education or training background to groom and handle my subordinates before I had the position	4 (6.6%)	9 (14.8%)	17 (27.9%)	14 (23%)	17 (27.9%)	3.51±1.23
6. It was important to have a mentor in the first supervisory management position	2 (3.3%)	0 (0%)	9 (14.8%)	13 (21.3%)	37 (60.7%)	4.36±0.97
7. Developing the management skills before moving to the current position will reduce the gap between the managers' talents and the required skills	0 (0%)	5 (8.2%)	6 (9.8%)	15 (24.6%)	35 (57.4%)	4.31±0.96
8. I prefer to have a structural succession planning program before moving to any future management position	0 (0%)	3 (4.9%)	8 (13.1%)	13 (21.3%)	37 (60.7%)	4.38±0.9
9. The succession planning program is needed only for the first management position	14 (23%)	5 (8.2%)	21 (34.4%)	4 (6.6%)	17 (27.9%)	3.08±1.49

Once asked about the optimal duration of the succession plan at their organization, almost two-fifths of the participants reported that it is supposed to be 4 to 6 months (39.3%), and 29.5% of the participants reported that succession plan has to be 2 to 3 months

duration, while only 13.3% of the participants mentioned that the optimal succession plan duration must be a minimum of 7 to 12 months to be effective (Figure 1).



**Fig-1: Participants’ opinion about the optimal Succession plan duration (N=61)**

Concerning the challenges encountered by the participants in their current managerial position, the participants were given the opportunity to write their opinion about these challenges using open-ended question. Data were assessed and segregated into four main themes (Table 3). The biggest challenge as reported by 23% of the participants was associated with “multi-tasking and difficulty balancing between academic and administrative duties”. The next

challenge was summarized in “miscommunication with other departments” (10%), only 8% of the participants reported “unequal and insufficient distribution of staff on the committees” as one of the challenges they encountered in their current managerial position, while the least reported challenge by the participants was “the improper endorsement from the previous committee chair or head of department”.

**Table-3: Themes of the challenges encountered in the current managerial position (N=61)**

Managerial challenges in the organization	n	%
Multitasking and difficulty balancing between academic and administrative duties	14	23%
Miscommunication with other departments	6	10%
Unequal and insufficient distribution of staff on committees	5	8%
Improper endorsement from the previous committee chair or head of department	4	7%

As for the challenges, facilitations of the current managerial position were assessed using open-ended question and the main themes of those facilitators were five (Table 4). The greatest facilitator reported was “the previous managerial experience they had” followed by “the friendly and cooperative teamwork”.

The “guidance from policies and procedures manual” came next along with “the support they have received from the top management”. However, the least facilitator was gained from “the experience in statistical analysis the participants had”.

**Table-4: Themes of the reported facilitations in the current managerial position (N=61)**

Managerial facilitators at the organization	n	%
Previous managerial experience	6	10%
Friendly and cooperative teamwork	5	8%
Guidance from the policies and procedures manual	4	7%
Support received from the top management	4	7%
Experience in statistical analysis	3	5%

## DISCUSSION

The study aimed to identify the perception of the managers about succession planning and its implementation in the organization. There was a

variation in the participants’ response to the question that assesses the existence of succession planning at the organization. This variation reflects that succession planning in the organization is existing, but it is still in

the development stage, where it is not clear to all the managers.

The findings revealed that most of the participants in the current study preferred to have an implemented succession planning policy before moving to any other managerial position in the future which makes the transition process easier and helps for a better understanding of the duties and responsibilities towards greater success. Succession planning is one of the most important pillars of the effective transition of managerial duties and responsibilities and having the right managers in the right place (Calareso, 2013; Cannon & McGee, 2011; Griffith, 2012; Martin & O'Shea, 2021; Rothwell, 2010; Rothwell, 2011). Formal succession planning strategies and programs can provide skilled and knowledgeable internal candidates to fill key vacancies (Martin & O'Shea, 2021). Moreover, having mentorship for any managerial position has taken a high priority according to the respondents, especially for the first supervisory management position. The general orientation program only is not sufficient and there is a need for focused orientation to the detailed technical managerial issues with direct guidance or mentoring during the initial period of the new positions as reported by some previous studies (Gisbert-Trejo *et al.*, 2019; Meyer, 2017; Wang *et al.*, 2018). Most of the Responses confirmed that succession planning is an important issue for any managerial position whether it was the first managerial position or not.

Another objective of the study was to explore the challenges and facilitators in the managers' responsibilities. The participants in this research reported four barriers and five facilitators. However, Multitasking, miscommunication, improper committees' distribution, and improper endorsement were the main themes of the challenges. On the other side of the coin, previous managerial experience, cooperative teamwork, guidance from the policies and procedures manual, and support received from the top management were the facilitators' themes that emerged in the open-ended questions. The current managers explained their concerns about the effect of communication skills in managing their current position. Participants from another study expressed that the common managerial barriers were the "confusing instructions", "improper endorsement from the previous stakeholder" and "having no clear vision or planning from previous directors" (Al Hosis, 2010). AlHosis *et al.* (2012) and Gordon and Overbey (2018) also reported that communication, the scope of practice, and knowledge are important manager competencies to facilitate successional planning.

Along with the communication, the participants indicated their desire to have a structural successional planning program before moving to any future management position and motivation from the

higher managers in their current position. The literature reported similar findings, which are that the education and training, strategic plan for successional planning, and motivation to improve succession planning for managers are of vast importance for the continuity and success of any organization (Al Hosis, 2010; Al Suwaidi *et al.*, 2020; AlHosis *et al.*, 2012; Brown *et al.*, 2013; Obianuju *et al.*, 2021).

### Limitations

Study limitations included the recruitment of a small sample size and the use of a non-random sampling technique which limits the generalizability. Further research is recommended to focus more on the improvement of the available facilitators and supported recourses in the organization.

### CONCLUSION

This study showed that Mohammed Al-Mana College for Medical Sciences (MACHS), like all other educational institutions, needs to develop effective succession planning for managers through designing a structural successional planning program. Based on the preceptors' feedback, the program should have an orientation timetable (4-6 months). The program should include leadership series lectures for all the needed management skills to overcome the main obstacles such as miscommunication, time management, and to have a clear overview of the future management responsibilities before moving to a new position.

### RECOMMENDATION

It is recommended to develop, implement, and foster succession planning at medical and educational institutions to assure proper endorsement and handling of managerial positions over a long period. The findings revealed some obstacles to succession plan implementation in the organizations, such as multitasking, miscommunication, improper workload distribution, and improper endorsement, therefore, working to overcome these obstacles is highly recommended and certainly will improve the implementation of effective succession planning. Succession planning of 4 to 6 months is optimal to be utilized in academic institutions.

### Abbreviations

Mohammed Al-Mana College for Medical Sciences (MACHS), Statistical Package for Social Sciences (SPSS)

### Author contributions

MAS had the correspondence of the study, conceived, and designed the study, did the statistical analysis, editing, and submission of the manuscript. ASS did data collection, drafted the paper, and reviewed the manuscript. Both authors provided input into the manuscript and approved the final version.

**Ethical approval**

Ethical approval was granted from the institutional review board of Mohammed Al-Mana College for Medical Sciences before embarking on data collection process (ethical approval number: SR/RP/73).

**Source of funding**

The researchers did not receive any sort of funding in this research work.

**Conflict of Interest**

The researchers declare no conflicts of interest in the research work.

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