

Planning for the Future

Ensuring Effective Leadership Transitions
A Guide for Boards of Directors

Succession Planning – What is It?

- **Proactively** ensuring the stability and sustainability of the organization by thinking and planning ahead
 - Best time to talk about succession planning is when there is no expectation of an imminent vacancy
 - No one strategy works for all organizations – needs to be your own
 - Organizations evolve and transition strategies need to evolve with them

Succession Planning – What is it?

- Good plan includes a variety of potential circumstances:
 - Temporary vacancy (30 days or less)
 - Temporary, short-term vacancy (30-60 days)
 - Temporary, long-term vacancy (60+ days)
 - Permanent – Planned and Un-Planned
- Each circumstance requires a different approach by the Board and staff

Succession Planning: Why do it?

- Protects the stability and security of the organization
- Leadership transition is *inevitable*
- Leadership transition NOT planned for is the most common catalyst for organizational demise
- Leadership transition **PLANNED FOR** is most common catalyst for transformative organizational evolution

Succession Planning: Who is Responsible?

- An ongoing responsibility shared by the Board and the Executive Director
- All about developing leadership *throughout* the organization
 - On the Board
 - One the Staff
 - On the Multidisciplinary Team

Succession Planning: When and Where to start?

- Now!
- Begin asking questions and assessing organization's readiness for transition
- Routinely schedule time for discussion on Board agendas
- Consider appointing a committee responsible for conducting an assessment and making recommendations for a "preparedness" strategy

Questions to Consider...

- Do we maintain a current Information and Contact Inventory?
- Do we have a formal plan for temporary absences (short term and long term)
 - If yes, when was it last reviewed and updated?
 - If yes, are all Board and staff familiar with the plan and what their role might be?
- What level of cross-training is currently in place throughout the organization?

Questions to consider...

- Does the Board have the right mix of people for directing, engaging in a permanent transition process? If not, what traits, expertise, etc. are missing?
- Is the executive director's job truly "do-able"?
- Is the salary competitive in the current environment?
- Do we have funds available for a search and hire process?
- Is the organization positioned to experience a funding or revenue dip?

Questions to consider...

- What kind of leader does the organization need *moving forward*?
 - Can we name the characteristics and skill sets we will need moving forward?
- Are there any obvious candidates for the job?
 - Internal
 - External
- Is there anything the Board can do now to extend the longevity of our current executive director?