



5 Good Ideas Succession Planning Done Right!

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5 GOOD IDEAS

1. Develop a mission & vision-driven 3-year strategic plan
2. Leadership evaluates their commitment
3. Assess organizational capacity and infrastructure
4. Develop an emergency succession plan
5. Conduct an effective search



Good Idea Number One

Board and Executive Director create a mission/vision-driven three year plan


- ◆ Clarity of a vision for the organization in 3 years
- ◆ Identify the leadership skills necessary
- ◆ Measurable goals and objectives



Good Idea Number Two

Leadership evaluates their commitment

- Board Commitment
- Staff Commitment




Board Commitment

- Courage to assume board leadership roles and responsibilities
- Dedication to provide financial sustainability
- Consistent, clear communication between the ED and Board about the future
- **Bold** assessments to identify organizational and infrastructure weaknesses and strengths
- Acknowledgement and recognition of skills sets needed in 3 years



Executive Director's Commitment

- Self evaluation of personal mission and vision for the future
- Personal timeline and exit strategy
- Benefits of a coach or sabbatical
- Identify what needs to be done before they leave.
 - History, data base, relationship to donors, staff training, exit strategy



The Founders Challenge

- Founders are entrepreneurial
- The founder and the organization's identity blur
- Founders do a lot of work for little money
- Founders often create and manage the board
- Founder's fears: organizational collapse, board strength, loss of vision, being forced out, letting go.
- Founders hold a lot of information in their heads and hearts.



Good Idea Number Three

Succession Planning Requires Organizational Capacity and Infrastructure Assessment

- Conduct an Environmental Scan with interviews or survey of board, staff, clients thought leaders, technical experts
- Identify top three priorities that need improvement
- Recommend action steps to address them

Assessment Topics

- Governance
- Strategic Direction
- Fundraising and Development
- Board Development
- Visibility and Marketing
- Financial management
- Staff
- Volunteer Engagement
- Strategic Partnerships
- Outcome Measurements



Good Idea Number Four

Develop an Emergency Succession Plan

- Review staff competencies
- Identify organizational and executive leadership skills
- Determine chain of command – who is in charge ?




Develop an Emergency Succession Plan

- * Determine and prioritize key relationships with funders and stakeholders
- * Create a communications plan
- * Plan for 30-60-90 day preliminary transitions

Conducting the search

- Advertise in appropriate publications – be careful!
- Narrow the search to the top 25 to interview
- Face-to-face interviews with the top ten
- Board interviews 3-5 finalists
- Reference checks
- Negotiate and hire top candidate



Don't

- Don't ask the ED to be involved in the search
- * Don't ask former ED to serve on the board
- * Don't avoid the conversation about succession with the ED
- * Don't let ED leave before they update the data base with donor information and key historical information.
- * Don't skimp on resources



Good Idea Number Five


Effective Succession Transitions

- * Appoint a search committee to assume responsibility
- * Create a Timeline for the process
- * Review skills and talents required for the position
- * Develop the job description and search criteria
- * Communicate with key stakeholders



Do

- Engage the full board in the search. This decision has a huge impact on the future
- Provide for appropriate overlap for training
- Leave room on the strategic plan for the new ED to make their mark
- Allow the ED to be involved in their own succession planning
- Train from within with staff development



Questions? Answers?

Next Steps

- **Case Study**
- **Group Reporting**