


future
replacement
communication
leaving
stability
unexpected
change
development
leader
continuity
mission
donors
seamless
staff
strategic
promotion
retirement
sustainability
Succession
relationships
participation
skills
interruption
Planning
capacity
growth
next
survival
transition
passion
founder
success
meetings
baton
anxiety
emergency
ongoing
executive

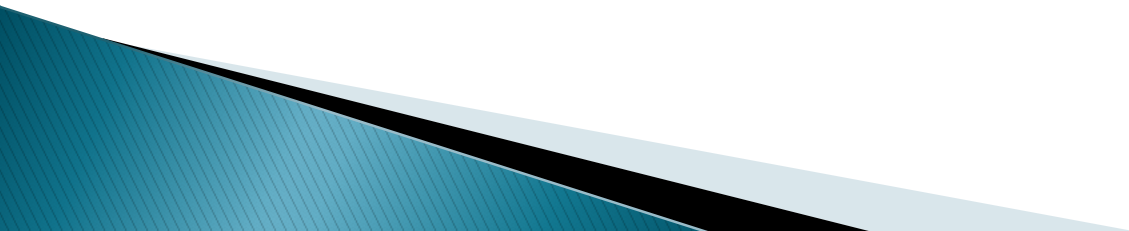
Today's Session

- ▶ Succession planning = long-term sustainability
 - ▶ Components of an effective succession plan
 - ▶ Five options to begin building your plan
 - ▶ Tools and resources
- 

Succession planning develops your most important resource.



Succession Planning Terms



Succession Planning Terms

Transition
Planning

GOAL:
Structured
Pathway
Between
Leaders

Position

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Succession
Planning

GOAL:
Leadership
Continuity

Organization

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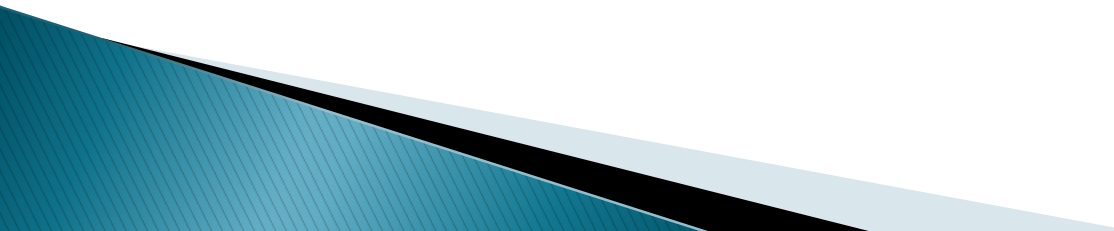
Position

Career
Planning

GOAL:
Growth in
Skills and
Loyalty

Person

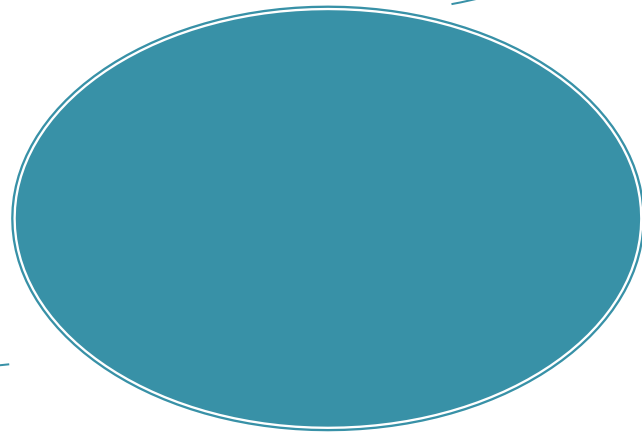
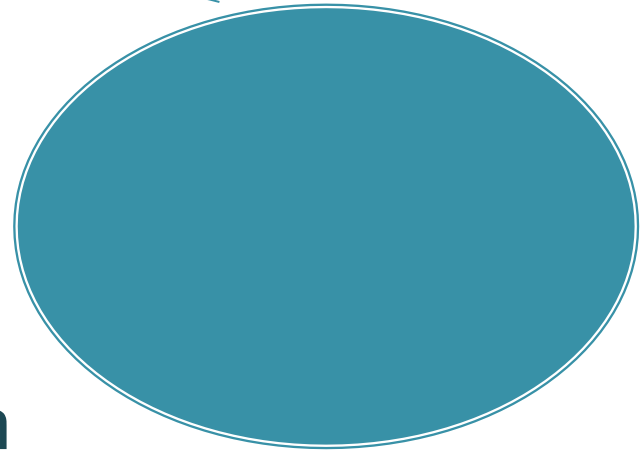
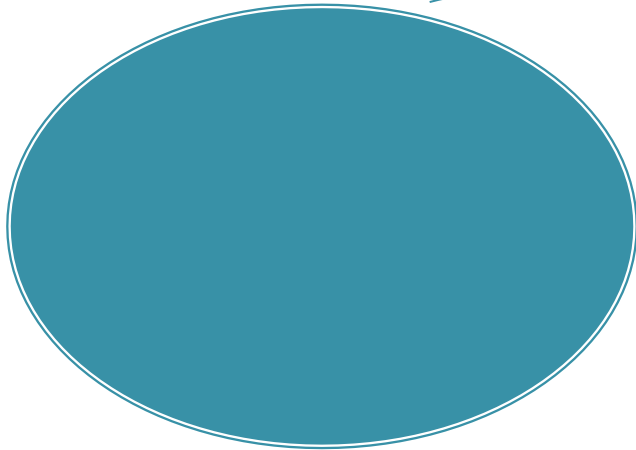
Succession Planning for Whom?

- ▶ Not just the chief executive
 - ▶ Not just the senior team
 - ▶ Not just the paid staff
- 

Components
of a
Comprehensive
Succession Plan

Common
Understanding
of Succession
Planning

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Managing
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Key Human
Resources
Practices

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Strategies
to Develop
People

Board
Policies for
Leadership
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Key Human
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***Options for
Beginning Your
Succession Plan***

Create
Conversation
About
Succession

Plan for
Sudden
Vacancies

Adopt
Leadership Continuity
Policies

Retain and Motivate
Your People with
Good HR Practices

Build a
Resourced
Strategic Plan

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Create Conversation About Succession

- Take time to do it right
- Retreat setting is ideal





***What Is Your
Leadership
Continuity
Landscape?***

**A Quick
Self-Assessment
Tool**

Create Conversation About Succession

- Talk about the assessment results
- What items seem most important?
- Take notes for future discussions
- Include senior team and key volunteers



Emotion



Emotion

- ✓ Be Transparent
- ✓ Be Accountable
- ✓ Be Participatory
- ✓ Focus on the Mission



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Plan for Sudden Vacancies



**Nonprofit Information
Inventory**

**Position Vacancy
Strategies**

**Professional Interim
Leadership**



Photo by JESHOOOTS.COM on Unsplash

Nonprofit Information Inventory

- ▶ Update yearly during budget process
- ▶ Review vendor relationships
- ▶ Control the distribution
- ▶ Provide to incoming leader once status is formalized



Position Vacancy Strategies

- ▶ Annual performance reviews
 - Good communication
 - Updated job description
 - Look forward...

Position Vacancy Strategies

- ▶ Annual performance reviews
 - Good communication
 - Updated job description
 - Look forward...
- ▶ Position contingency plans
 - Memo updated at each performance review
 - Include senior team, other key positions
 - Do planning with people (not to them)

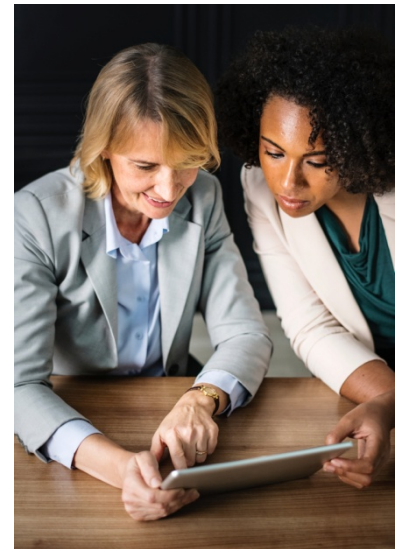
Professional Interim Leadership



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Professional Interim Leadership

- ✓ Experienced leadership on short notice
- ✓ Objective resource for best practices
- ✓ More time to recruit and hire next leader
- ✓ Specialized skills to match situation
- ✓ Shock absorber to ease change
- ✓ Solve problems before next leader arrives
- ✓ Assist with search process



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Adopt Leadership Continuity Policies



Adopt Leadership Continuity Policies

- Chief Executive Succession Policy
- Regular compensation reviews
- Annual executive performance reviews
- Board self-assessment
- Board succession



Chief Executive Succession Policy

Template in Succession Planning Policy Guide
(not a substitute for legal advice)

Chief Executive Succession Policy

Template in Succession Planning Policy Guide
(not a substitute for legal advice)

Provides for

- Short-term absence
- Long-term absence
- Permanent vacancy

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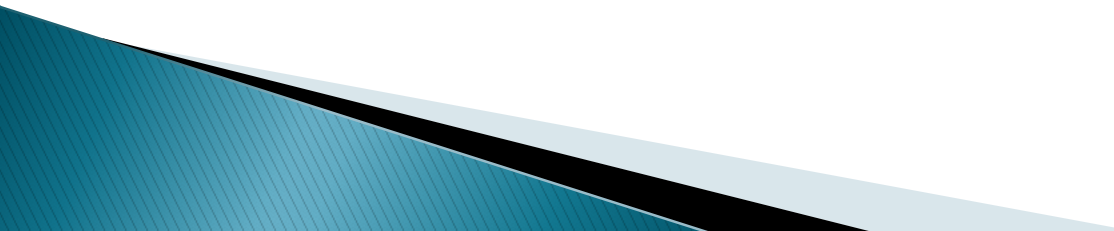
Adopt Leadership Continuity Policies

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Group Poll

How do board term limits impact your organization?

- a) We don't have term limits.
 - b) We have them but they aren't enforced.
 - c) Our term limits promote board turnover.
 - d) I'm not sure.
- 

Board Succession

❖ Term Limits

28% of boards have no term limits

BoardSource
Leading with Intent, 2017

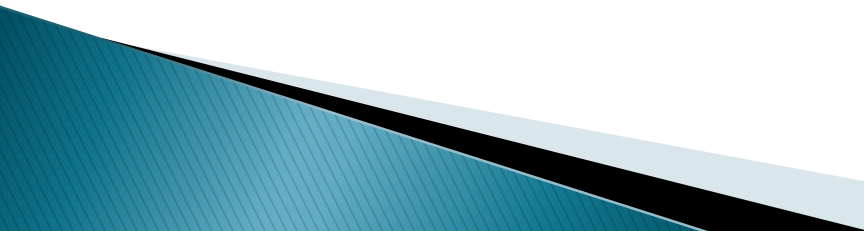
Board Succession

- ❖ Term Limits
- ❖ “Career Path” to Board Chair Role

Board Succession

- ❖ Term Limits
- ❖ “Career Path” to Board Chair Role
- ❖ Three Stages of Board Chair Role
 - Chair-Elect
 - Board Chair
 - Immediate Past Chair

Board Succession

- ❖ Term Limits
 - ❖ “Career Path” to Board Chair Role
 - ❖ Three Stages of Board Chair Role
 - ❖ Chair-Elect Role in Work Groups
- 

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Retain and Motivate Your People




Retain and Motivate Your People

What's a key human resources practice at your organization?



Key HR Practices (Partial List)

- ✓ Accurate job descriptions (including volunteers)
 - ✓ Personnel file for each employee
 - ✓ Budget for professional development
 - ✓ Updated volunteer and employee handbooks
 - ✓ Performance reviews that look back and ahead
 - ✓ Regular compensation reviews
 - ✓ Strong whistleblower protection policy
 - ✓ Inclusive and equitable hiring practices
- 

Leverage HR Practices for Succession Planning

- Small group discussion
What HR practices would protect our people and help them be more successful?
- Engage board, other volunteers and staff
- Update your practices (and give credit for input)



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Photo by rawpixel on Unsplash

Build a Resourced Strategic Plan

KEY QUESTIONS

How much does your strategic plan cost?

Does that amount include the cost to develop and support human capital?

How would you develop the human capital your plan requires?

What does your strategic plan say about the value of people and their impact on your mission?



Build a Resourced Strategic Plan



Succession planning safeguards your mission.



Succession planning develops your most important resource.



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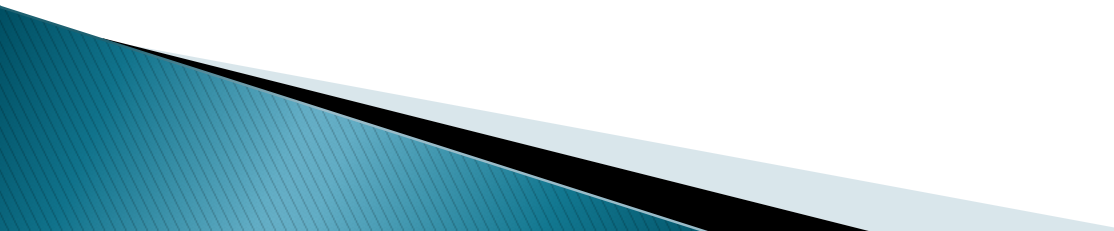
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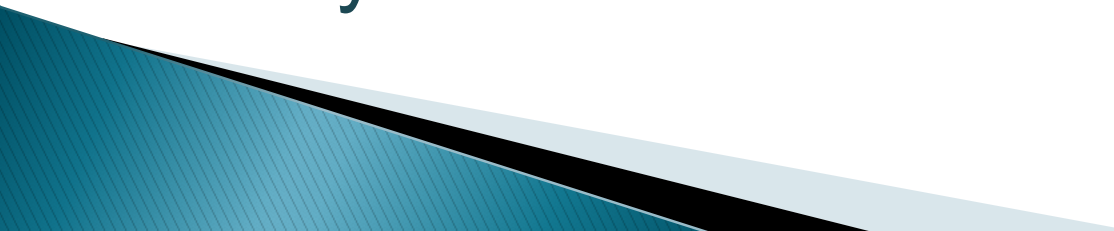
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Taking Action

- ▶ What's the best option for your organization to start with in building your culture of leadership continuity?
 - ▶ Who will be your organization's champion for leadership continuity? How will you find and support that person?
- 

Taking Action

SOME FIRST STEPS

- Talk to someone in your organization about this topic and find out what they think.
 - Invite your board and senior team to complete and discuss the Leadership Continuity Self-Assessment.
 - Share the Nonprofit Information Inventory with your Chief Executive or Board Chair.
- 

Questions?

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