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
- On 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?