

Succession Planning



What is Succession Planning?

process of identifying potential leaders and training them

a deliberate and systematic effort

develop intellectual and knowledge capital for the future, and encourage individual advancement

serves as a risk management tool

vulnerable to environmental stresses, such as a loss of external funding

organization is prepared to extend its legacy

What it's Not:





Benefits of Succession Planning

- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]

Risks of Not Engaging in Succession Planning

- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]

3 Types of Planning

1. Strategic Leader Development

- a. Evaluate a candidate's past performance
- b. Conduct periodic competency assessments
- c. Gamify the succession process
- d. Ask for client feedback
- e. Review agency's direction to understand what qualities are required

3 Types of Planning

2. Departure Defined Succession Planning

- a. Understand each managers' tenure and stick to it
- b. Engage the board/upper management completely

3 Types of Planning

3. Emergency or Interim Succession

- a. Create an emergency activation team
- b. Clarify board responsibilities
- c. Consider cross-training management staff
- d. Understand the fallout a sudden exit can have

Who is Responsible?

Committee of the board

Leadership succession at board level

Staff leaders for their succession

board is responsible for executive director

8 STEPS FOR EFFECTIVE SUCCESSION PLANNING PROCESS

- 1. Start early & make it an ongoing, team effort**
- 2. Plan based on the kind of leadership you want**
- 3. Identify and plan for predictable vacancies**
- 4. Consider the vacancies you cannot plan for**
- 5. Test your succession strategy in real scenarios**
- 6. Think about succession as it pertains to hiring**
- 7. Use employee input to guide your decisions**
- 8. Enlist the help of experts**

Questions





Compassionately Navigating Compacity

Nonprofit Mentoring
Board Training

Grant Assistance
Strategic Planning

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Topic 1: Succession Planning

- 1. What would happen if the leader(s) of your organization were suddenly absent?**
- 2. Who would lead and/or take over certain aspects of the nonprofit's work?**

