

# SUCCESSION PLANNING



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National Self-Help Housing Conference

# Why Consider Succession Planning?



We often think of succession with an aging Executive

- *But, transition can happen for many reasons - please share some*
- *There are Planned Successions and Emergency Successions*
- *Planned Successions are those with adequate notice*
- *Executive positions are key to organizational success - don't want to be caught off guard without a process*
- *Best to have a Board approved plan, available when needed*



# A Unique Task for the Board of Directors



- *Employing the Executive is a unique task of Board Governance*
- *The Board hires/employs the Executive, who in-turn hires the organization's other employees*
- *Hopefully the Board doesn't have to hire Executives very often - so the task feels new to them*
- *How many of you have been through an Executive Transition?*
- *What was it like? Planned or Emergency? How did it go?*

# When Learning of an Impending Transition

- *If emergency, name Acting or Interim, often 2<sup>nd</sup> in charge*
- *Board should speak with Executive annually about their plans*
- *If a plan exists, dust it off, review it, and update it*
- *If no plan, develop one - a good plan can be brief*
- *Executives should give ample notice for a quality transition*
- *Executive succession/transition is the priority*
- *Name Search Committee to guide process*





# A DECISION - Will the Board need the assistance of a consultant?



- *If a plan exists, it probably addresses this*
- *Consultants can facilitate and guide the process with the Board - often used for larger nonprofits or if a long-tenured Executive or founder leaves*
- *Leader transitions can impact organizational health and they create an opportunity for the Board to envision its future*
- *Some consultants specialize in regional/national searches, and local consultants can be found at your state nonprofit association*
- *May find a funder to pay for consultant or succession process*

# GETTING ORGANIZED FOR A SEARCH - Board figures out what they want in a new Leader



What experience? What skills? What education? What leadership style? What traits and qualities are important?

- Board brainstorms and spends time envisioning what they want
- Have current Executive list everything they do
- Modify the Position Description to reflect new vision
- List some ranking/selection criteria
- Appoint a Search Committee



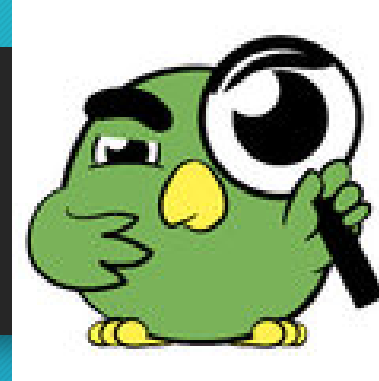


# GETTING ORGANIZED FOR A SEARCH - Develop an Organizational Profile

- *You want to present organization in most professional manner in order to attract quality applicants*
- *Use this as an opportunity to market your organization*
- *Applicants need to know financial status, accomplishments, some history, and plans for the future*
- *Update your website and social media*



# The Search Itself



- Where to advertise? Indeed - Idealist - LinkedIn - networks such as local HFA and Association of Nonprofits - affiliations such as NeighborWorks or Rural LISC - HAC - your T&MA Contractors - social media - your own vast contact list of stakeholders
- Develop your search plan: when to go public - how long to advertise for - the closing date for applications - who they should be emailed to - what constitutes a complete application
- Have a Point of Contact who will do initial review and send out eligible applications to the Search Committee



# The Selection



- *Refine ranking criteria and rank applicants*
- *Determine which applicants you wish to interview*
- *Prepare open-ended interview questions for top candidates*
- *Use ranking criteria to rank those interviewed*
- *Perhaps have 2nd interviews with top 2 or 3*
- *Check references*
- *Negotiate and offer position*

# The Job is Done, Right?



Executive succession takes a lot of time and energy, and often Boards and Search Committees can feel exhausted. When a selection is made it feels like their job is done.

However, the Board's role is to help make sure this new Executive succeeds and the organization thrives - and so there is more to do.

And so there is another critical step!



# On-Boarding, Introduction, and Training

The On-Boarding process is important to success:

- Develop and implement an Orientation Plan
- Introduce Executive to Board, staff, community, and stakeholders
- Meet and Greet, meetings, public settings
- Provide training where needed
- Establish review timeframes with Board
- Monitor progress and provide support



# Send the departing Executive off well

Presuming the Executive who is leaving or retiring has done well for the organization, it is important for the organization's culture to send them off well

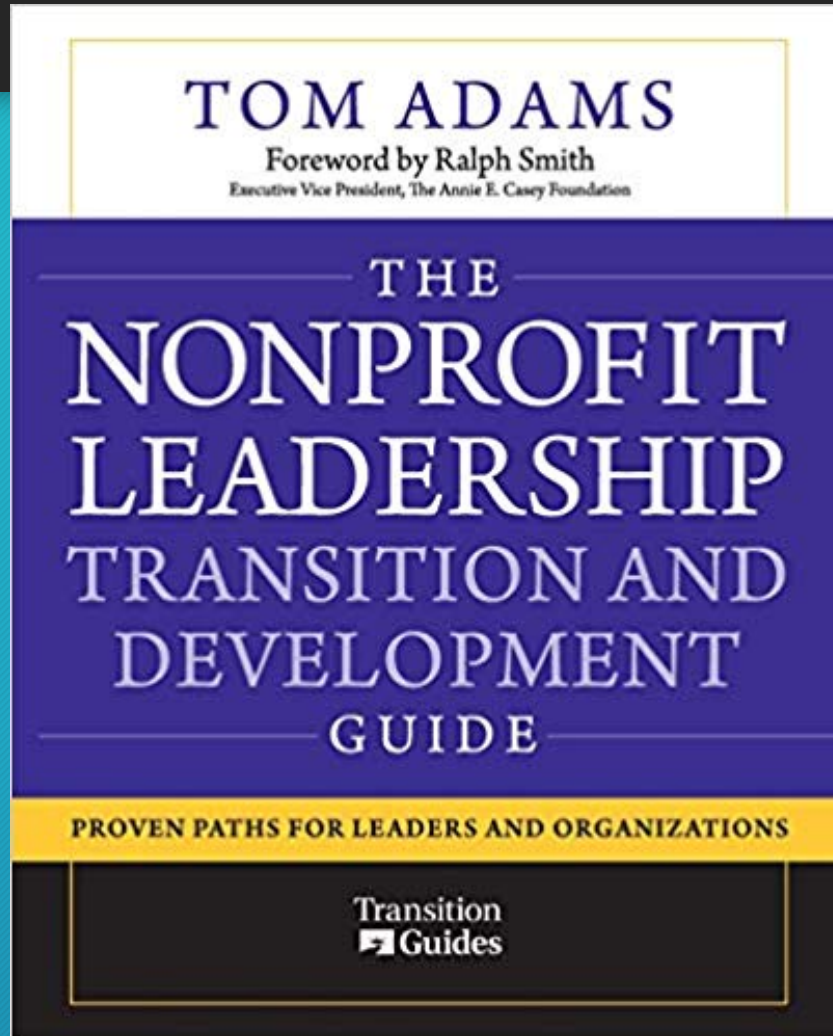
- Recognize their accomplishments
- Have a farewell event
- Give them a gift





# A Wonderful Resource

The book by Tom Adams, the guru on nonprofit transition and succession planning:



# Other Turnover/Transitions



Goodbye

Other turnover and transitions of key Staff, Program Directors, Financial Personnel, etc., fall under the leadership of the Executive Director or CEO.

These transitions can cause interruptions and angst, and internal planning can be done to help.

It is important for the Executive to have an Emergency Plan in place should a key employee give notice of leaving.



# A Simple Plan for Turnover

A rectangular sign with a white center and red borders at the top and bottom. The text "Now Hiring" is written in a bold, black, sans-serif font in the center.

Do a spreadsheet listing key positions and the following information:

- Position title, the team, who supervises
- Expertise, traits and skills important for the position
- Minimum education/experience requirements
- How to advertise the position?
- Who can fill responsibilities during the interim?
- Who will be involved in hiring decision?

# Thank You and Best Wishes

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