

What is Executive Succession Planning?

- A structured process
- Ensures leadership continuity
- Retains and develops knowledge, skills and people resources
- Builds relationships
- Strengthens organization's effectiveness and builds "leaderful" organizations

Types of Succession Plans

- Emergency Succession
- Departure Defined Succession
- Strategic Leader Development

Emergency

- *Process in place for when ED suddenly departs, like death, immediate firing or illness*
- The executive, along with input from the board and key staff, drafts the emergency succession plan and presents to board for more discussion and approval

Benefits

1. Reduces emotional component
2. Unique opportunity to examine & evaluate current leadership structure & job responsibilities
3. Help ED and board better plan looking for gaps & assets in organization
4. Review Communication Plan
5. Gain clarity on board and staff roles and responsibilities
6. **Key:** Do this ***BEFORE*** an emergency

Departure Defined

- *Process in place for future planned retirement*
 - Allows an organization to position for sustainability and continued success once the ED leaves
 - Includes input from current leader
 - Can be difficult—especially in a founder led organization or someone who has been in position for a long time

4 Key Questions

1. Is the organization ready for change in leadership style to ensure durability and effectiveness of organization?
2. How committed and supportive is board to a new successor? Open to new ideas? Willing to explore new directions?
3. Has departing ED fully addressed personal and professional barriers to embrace the departure and support the transition?
4. Has successor been prepared to assume the ED role?

Strategic Leader Development

- *Process that promotes ongoing development for talent within the organization*
 - This is not simply about ED, other key staff positions
 - Creates a culture of leadership development for talent with NPO
 - Capacity building plan

Benefits

1. Ensures continuous duties being carried out, smoothly
2. Creates a culture of development—people feel a part of something, where they can grow and develop and learn
3. Proven tool in talent retention & attracting new talent
4. Important when you are a larger organization

Reflection

- ✓ What already exists as far as succession planning in your organization? What 's working? What needs more attention?
- ✓ Determine your reason for succession planning: what do you need?

Recommendations

1. Schedule time at your board meetings, with ED's involvement, to begin conversation about Succession Planning (and Emergency Plan)
2. Board needs to understand the implications of NOT having a plan
3. Board needs to know and accept that this is part of their governance duties
4. Mentor and develop your staff
5. Communicate that planning is underway

Next Steps

- Dates for Learning Community Sessions:
July 19, 11:30 am to 1 pm
August 8, Noon to 1:30 pm
 - Evaluation Form
 - **BIG** Thanks
 - One Word Check Out