SUCCESSION PLANNING AND BUILDING “BENCH STRENGTH”

BY MIKE ANGSTADT AND ROSALIND ALSTON
CONSULTANT AND DIRECTOR OF ADVOCACY
TWIN CEDARS YOUTH AND FAMILY SERVICES, INC.
SUCCESSION PLANNING AND BUILDING “BENCH STRENGTH”

• Learning Objectives:
  ✓ Understand the need for Succession Planning
  ✓ Develop a framework for creating your own Succession Plan
  ✓ Determine pivotal positions
  ✓ Identify and developing bench strength around you
  ✓ Understanding the guiding principles to managing transitions
SUCCESSION PLANNING AND BUILDING “BENCH STRENGTH”

• Leadership change is inevitable for every organization

• Sometimes it is planned, however, more often it occurs suddenly and unplanned
Succession Planning: “The ongoing process of systematically identifying, assessing, and developing talent to ensure leadership continuity for all key positions.”

- American Society of Association Executives
SUCCESSION PLANNING AND BUILDING “BENCH STRENGTH”

Twin Cedars University Topics:

* Client Rights and Behavior Management
* Team Building
* Twin Cedars programs, services and infrastructure
* Ethics
* Governance and Board Structure
* Strategic Planning
SUCCESSION PLANNING AND BUILDING “BENCH STRENGTH”

Twin Cedars University Topics:

* Budget and Finance
* Trauma, Trauma Responsive Community and Culture
* Human Resources
* Marketing and Development
* Administrative Services and Risk Management
* Performance and Quality Improvement (PQI)
TEN PLANNING TIPS FOR LEADERSHIP TRANSITION

• Gain the commitment of board and staff to manage transition intentionally
• Identify current challenges that lie ahead, determine what leadership skills are needed to navigate successfully
• Consider if selecting an interim is right choice for your organization
• Draft a timeline for leadership successions that are planned
• Draft or adopt an “Emergency Leadership Plan” to address delegation of duties and authority whenever there is an unexpected transition
TEN PLANNING TIPS CONTINUED

• Identify leadership development opportunities for staff and board members
• Cross-train current staff to minimize the disruption from unexpected staff changes
• Have a plan to orientate, support, coach, and mentor new employee
• Communicate: what your organization will communicate to stakeholders before, during and after a transition of leadership
• On board deliberately: help new staff/board feel confident
OUR ICEBERG IS MELTING
By John Kotter

Metaphor for change
GUIDING CHANGE

1. Create a sense of urgency to deal with a difficult problem
2. Carefully select a team to lead and guide the change
3. Find a sensible and relatable way to relay the vision
4. Communicate the vision so that others will understand and accept it
5. Remove as many obstacles to action as you can anticipate
6. Create or demonstrate a success as quickly as possible
7. Never let up until the need to change is firmly established
8. Ensure the vision will not be overcome by stubborn, hard-to-die traditions, naysayers or old ways of doing things
STEP-BY-STEP PROCESS

1. Review/Update Current Organizational Chart

2. Consider vital positions within the Board of Directors
STEP-BY-STEP PROCESS

2. Conduct needs analysis (current and near-term)
   • Consider organizational needs
   • Families 1st Prevention Act
STEP-BY-STEP PROCESS

3. Identify Pivotal Positions and/or staff you consider vital to your organization
STEP-BY-STEP PROCESS

4. Assess Risk of Turnover in Pivotal Positions or key staff

* Staff development plan
* “Stay” interview
STEP-BY-STEP PROCESS

5. Assess Opportunities within Current Staffing
   • “Building Bench Strength”
<table>
<thead>
<tr>
<th></th>
<th>High Potential/High Performance</th>
<th>High Potential/Poor Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High Potential/High Performance</strong></td>
<td>High potential/high performance people are highly promotable and should be included in the talent pool for pivotal positions. Aim to keep employee turnover low in this category.</td>
<td>Find ways to improve the performance of high potential/poor performance employees to improve their potential for promotion. Determine if they are committed to learning new skills, motivated to improve and if development will increase their performance.</td>
</tr>
<tr>
<td><strong>Low Potential/High Performance</strong></td>
<td>Keep people in the low potential/high performance category in their current position. Motivate them to maintain their performance and focus on their development plan to increase their potential.</td>
<td>Seek to improve the performance of people in this category and determine their commitment to your organization is worth the investment to help them improve.</td>
</tr>
</tbody>
</table>
STEP-BY-STEP PROCESS

6. Integrate Action Plan with Individual Performance Development Plan
DEVELOPING A SUCCESSION PLAN

Week 1

• Determine members/committee to complete a succession plan and make work assignments
DEVELOPING A SUCCESSION PLAN

Weeks 2-6

• Update job descriptions of pivotal staff
• Define ED responsibilities, compensation, authority and limitations
• Consider required board support, positions, experience, rotations and filling in gaps
• Determine backup plan and cross-training
DEVELOPING A SUCCESSION PLAN

If you need an emergency plan:

• Determine if an interim ED needs to be appointed
• Define top 5 objectives or challenges that will fall under the ED
• Determine key competencies (knowledge, skills, ability, management & leadership experience, strategic thinking, grant writing/management, fundraising/development skills, knowledge of finance, HR)
DEVELOPING A SUCCESSION PLAN

• Consider leadership style and traits (include undesirable traits)
• Develop a search plan for replacement (internal vs external)
• Consider appropriate compensation
• Outline level of authority and exclusions
• Communicate: plan/changes & timelines with internal and external
• Cross train staff to fill in some duties and on-board training for interim
DEVELOPING A SUCCESSION PLAN

Weeks 6-12

• Identify spokesperson for the organization
• Create an internal and external communication plan
• Outline process to recruit and select new ED
• Develop transition plan for outgoing/incoming ED
• Share completed succession plan with board and staff
RESOURCES

• National CASA intranet Standard 6 Human Resource Management
• Nonprofit Executive Succession-Planning Toolkit, Federal Reserve Bank of Kansas City
• Human Resources Central Washington University, Succession Planning
• Maine Association of Nonprofits – Mission Driven Executive Transitions Toolkit
• Board Source – Exit planning for retiring nonprofit CEOs, Communicating a planned transition, Chief Executive Transitions- How to hire and support a nonprofit CEO
• National Council of Nonprofits
•
DEVELOPING A SUCCESSION PLAN

Questions???

Mike Angstadt
angstadtmike24@gmail.com

Rosalind Alston
Ralston@twincedars.org