

# SUCCESSION PLANNING AND BUILDING “BENCH STRENGTH”

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# 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

The background is a dark teal gradient. In the corners, there are decorative white line-art elements resembling circuit boards or neural networks, with lines connecting to small circles.

***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

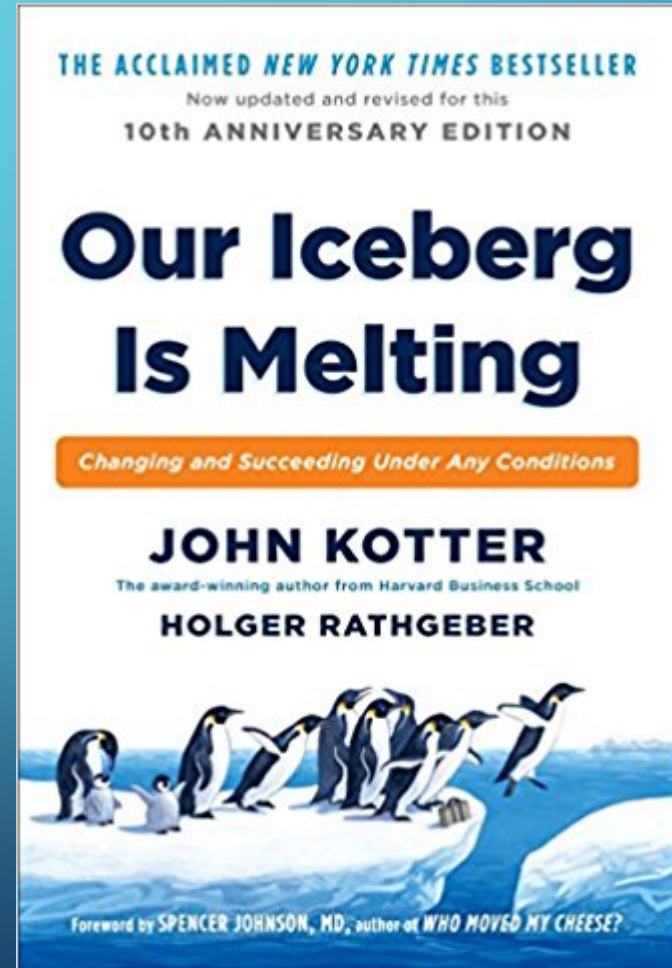
- Identify leadership development opportunities for staff and board members
- Cross-train current staff to minimize the disruption from unexpected staff changes
- Have a plan to orientate, support, coach, and mentor new employee
- Communicate: what your organization will communicate to stakeholders before,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



# OUR ICEBERG IS MELTING

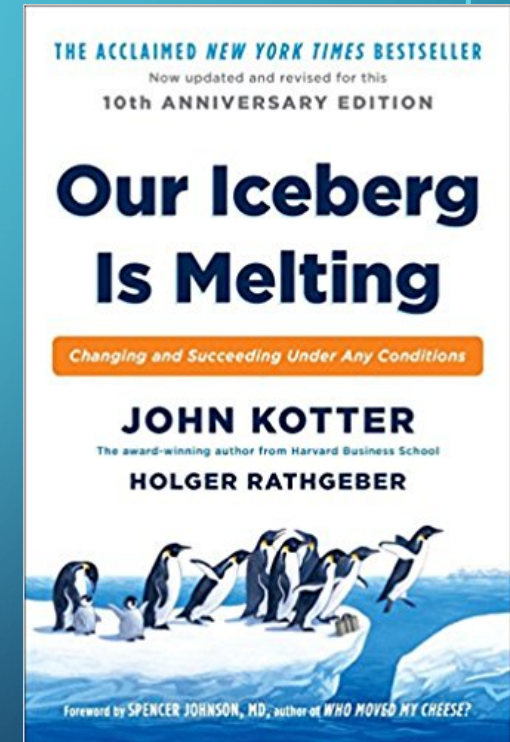
By John Kotter

Metaphor for change



# GUIDING CHANGE

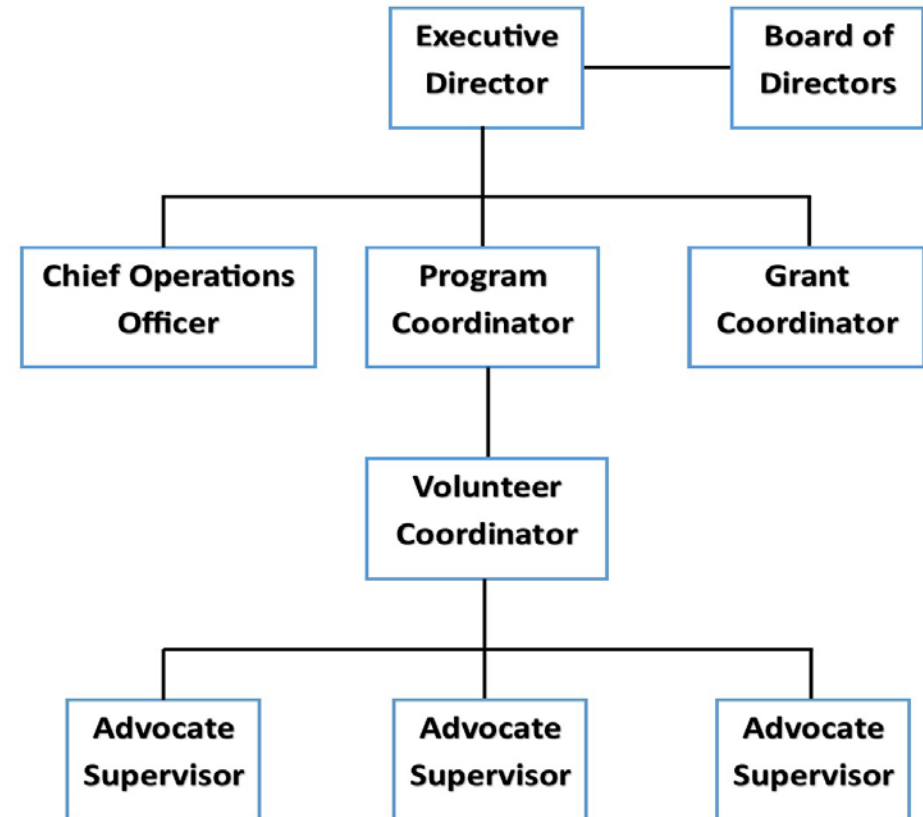
- 1 Create a sense of urgency to deal with a difficult problem
- 2 Carefully select a team to lead and guide the change
- 3 Find a sensible and relatable way to relay the vision
- 4 Communicate the vision so that others will understand and accept it
- 5 Remove as many obstacles to action as you can anticipate
- 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

# CASA



# STEP-BY-STEP PROCESS

## 2. Conduct needs analysis (current and near-term)

- Consider organizational needs
- Families 1<sup>st</sup> 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”

# STEP-BY-STEP PROCESS

<p><b>High Potential/High Performance</b></p> <p>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</p>	<p><b>High Potential/Poor Performance</b></p> <p>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</p>
<p><b>Low Potential/High Performance</b></p> <p>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</p>	<p><b>Low Potential/Poor Performance</b></p> <p>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</p>





## 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 ED

# 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
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# DEVELOPING A SUCCESSION PLAN

## Questions???

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