

Session #14 Overview – Executive Succession Planning

August 2, 2019 | 9:00am – 12:00 noon | Dick Goldbaum & Allie Chang Ray

EXECUTIVE SUCCESSION PLANNING

Effective succession planning improves the likelihood an agency will have strong staff and Board leadership, needed to increase service capacity, program effectiveness and long-term sustainability. Unfortunately, too often, succession planning is avoided or minimized, evidenced by a 2017 BoardSource survey indicating only 27% of participating nonprofits have a written succession plan. Planning helps agency leaders strategically respond to changes that create new leadership needs or roles, while building trust and communication. This session will outline steps of leadership succession planning, readying agencies for inevitable transition, fulfilling leadership needs, retaining institutional knowledge, expanding leadership development practices and considering other available options.

Special Instructions: Bring your agency's existing succession plan(s), if available.

Target Audience: Board members and executive directors.

Learning Objectives for Participants:

- Better understand why succession and leadership development are critical to agency success.
- Improve knowledge about key components to an effective succession plan.
- Gain insight and options about interim executive director and other key staff positions.
- Advance learning on expanding the culture and practices of leadership development.
- Prior to seeking a new executive or board member, consider possibility of developing a strategic alliance.

Key Concepts:

- A Succession Plan Guideline for your Organization
- Interim Executive Director Options
- Determining leadership skills sets needed for each leadership position
- Conducting a successful search
- Board succession planning

Group Interaction/Exercise: Compare leadership skill set analyses for the ED position.

Racial Equity Lens Application: Understanding and engaging community from a racial equity perspective.

Major Take-Aways by Participants: 1) Importance of a working succession plan, its components, need for intentionality and ongoing nature of process; 2) Importance of operational plan for all key positions; 3) Steps for conducting search, leadership skills assessment; and 4) Tools and resources, including board succession grids.

Key Concepts in Common with Other Sessions:

Session #10 Board Effectiveness; #12/13: Strategic Alliances; #15: Driving Direction.

To Learn More:

National Council of Nonprofits: Succession Planning for Nonprofits – Managing Leadership Transitions; and Collaborating for Equity and Justice, *Nonprofit Quarterly* (Winter, 2016)

About the Presenters:

Dick Goldbaum has 50+ years experience in the nonprofit sector, 25 years as executive director of two multi-million dollar organizations, a provider and funder of services and since 1997, Dick has led Transitions In Leadership, a consulting firm specializing in assisting nonprofits during leadership & organizational change. **Allie Chang Ray** is principal of Mutare Network, LLC, a consulting practice that provides guidance and support to grant-makers, nonprofit service providers and associations. By focusing on key capacity areas, including strategic planning, data collection and reporting, board governance and fund development, Allie helps to increase organizational effectiveness by working closely with leadership and other stakeholders.