



2010

RHY Issues@aGlance

Succession Planning: Tips to Help Youth- and Family-Serving Organizations Plan for Leadership Transitions

Organizations that serve runaway and homeless youth rely on strong leadership to pursue their missions. But with limited resources and pressing community needs, many—understandably—spend more time and effort helping youth and families than developing future organizational leaders. However, succession planning—preparing for leadership and organizational change—is essential, so that your goal of supporting youth and families can continue without disruption.

Understanding Succession Planning

Succession planning involves preparing for smooth leadership transitions and thinking in advance about how to ensure continued, strong leadership of an organization. It may also involve preparing an organization and its staff to deal with any major changes that come along.

Why is succession planning important?

Your founder and longtime executive director decides to retire. Your chief fundraising officer resigns. A popular board chair's term ends. The manager of your organization's largest program goes out on family leave and decides not to come back. Organizations face transitions for many reasons. How your organization handles those changes can make a real difference in your ability to provide seamless services to youth and families.

Succession planning helps

- Preserve continuity in an organization,
- Minimize loss of expertise and institutional knowledge,
- Encourage a broader objective look at an organization's strengths and challenges,
- Identify and develop committed people to be prepared to take over as leaders, and
- Uphold relationships in your community and with the youth and families you serve.

Why don't organizations do it?

Leaders and boards may have reservations about succession planning. Some leaders don't want to broach the topic for fear the board will think they're planning to leave. Boards don't want to raise the issue because they don't want leaders to feel they're being ushered out prematurely. And all know that succession planning will take some time, a scarce resource.

But if leaders, boards and organizations can overcome initial worries about succession planning, many find that the process generates real opportunities and excitement for the future.

Isn't succession planning for large organizations?

Succession planning is important for organizations of all sizes. Leadership transitions can be particularly challenging for smaller youth- and family-serving organizations where the executive director often takes on several roles, including managing operations, supervising staff, fundraising, and even providing direct services. An effective plan helps both large and small organizations be nimble enough and ready to get through any unforeseen changes that come along.



Preparing for Organizational Changes

Effective planning prepares for the management of the entire transition, from the time a leader announces plans for departure to recruiting and orienting a new leader. An effective succession plan provides staff with a compass to keep them oriented toward the organization's goals and a map to let them know what will happen day-to-day during the transition.

How do I develop a good succession plan?

Clarify your organization's mission. Are your mission and values clear? Do they reflect your organization as it currently operates? Succession planning is a chance to sharpen your vision, mission and goals.

Fully assess your organization's strengths and weaknesses. If a leader were to suddenly leave, are there any critical issues of concern? Succession planning is an occasion to objectively assess your resources and needs and spell out how a transition can be beneficial to your organization.

Keep board members and staff involved. Outline expectations for the executive director, the board and staff. Determine who will be responsible for identifying, recruiting, interviewing and selecting new leaders. Continue to nurture important relationships. Your plan should recognize the need to introduce board members and other staff to key fundraising and community contacts.

Review job descriptions, roles and responsibilities of your organization's leaders. Determine if they're appropriate for the current and future needs of the organization. If not, develop suitable descriptions of the key staff member's positions and responsibilities. What knowledge, experience, skills, and talents are necessary to succeed? Is the leader's job doable? Often a successful leader has, over time, taken on so many responsibilities that it would be nearly impossible to find another such superhero. A succession plan identifies the critical functions of key positions.

Outline the steps needed to make sure a transition is as orderly as possible. Think about how much notice a departing leader should give, if and how the current leader will be involved in a search, and how much overlap, if any, will be planned for the leaders. Outline a process for identifying people—either from within or outside an organization—who could potentially fill key positions and provide strategies for developing and/or hiring people to meet future needs. Plan to recruit a diverse group of candidates, and post-hiring, pair new leaders with a mentor to aid in the transition.

Prepare for an emergency. If a leader is suddenly unable to serve, who will? Identify what duties or responsibilities will need to be carried out if a key position becomes vacant. Address whether an interim leader will be put in place, or if the responsibilities will be filled by a number of people. Identify who in the organization (by position title, not name) will fill each of those duties during an interim period. Establish a timetable for filling open positions.

Where can I go for more information?

The Foundation Center Resource List on Succession Planning for Nonprofit Organizations

(<http://foundationcenter.org/getstarted/topical/succession.html>)

Free Management Library on Succession Planning

(http://managementhelp.org/staffing/planning/scs_pln/scs_pln.htm)

Blue Avocado: "Succession Planning for Nonprofits of All Sizes"

(www.blueavocado.org/content/succession-planning-nonprofits-all-sizes)

For more information:

Call: (800) 806-2711

E-mail: rhytechnicalassistance@ou.edu

Visit us on the web: www.rhyttac.ou.edu