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Succession Planning: Preparing for Leadership Transitions

Although executive director leadership transitions are a fact of life for nonprofits, even the most experienced board and staff members can find themselves unprepared when the moment arrives. Fortunately, succession planning can help make leadership changes more manageable while also strengthening our organizations.

Succession planning is the process of engaging the board and staff in preparing for a change in executive leadership, including making agreements about how the organization will develop and what actions will be taken. Two approaches have gained currency:

- **Emergency succession planning**, which involves defining backup procedures for fulfilling key executive director functions (or functions of other positions) in the event of an unexpected or planned short-term absence, and
- **Succession planning for strategic development**, which involves assessing and improving management and governance capabilities, and is often done as part of strategic planning and/or in the event that a departing executive director has given substantial notice (several months).

An emergency succession plan answers questions such as: Who is authorized to appoint an acting executive director? How much authority will the acting executive have? Who are our stakeholders and how will we communicate with them about the leadership transition? Who is authorized to speak for the organization?

A strategic development approach to succession planning involves taking stock of strengths, weaknesses, opportunities and challenges. It considers the organization's culture, including core values that must be carried forward with new leadership, and norms that have outlived their usefulness. This approach to succession planning offers more than a timeline and set of tasks: It is a tool for creating a more sustainable organization by building the board and staff team, engaging the board in a crucial aspect of governance, and broadening leadership. Last but not least, such planning can help clarify the legacy of a departing executive, setting the stage

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for a graceful goodbye and a healthy start for the next staff leader.

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