

# Laying the Foundation for Leadership Succession

1. **Foster a learning culture** that emphasizes appreciation and evaluation. Nurture a healthy partnership between the executive director/CEO and board chair in which each is willing to challenge and support the other. Assure that all staff, including the executive, receive regular feedback on their performance. Assure that the board, too, evaluates its performance. Integrate evaluation across the organization, and routinely reflect on accomplishments and lessons learned. Take time to celebrate significant personal and organizational milestones.



2. **Create systems to transfer knowledge with ease.** Document processes and procedures. Assure that crucial information does not reside solely “in the executive’s head.” Pay special attention to documenting financial management policies and procedures.

3. **Make leadership development a priority.** Encourage and support board and staff members in developing their leadership, e.g. through on-the-job assignments, training, mentoring and participation in professional and peer networks.



4. **Stay up-to-date with strategic planning and assure that planning is participatory.** Planning engages the board and staff in considering strengths and challenges, examining trends in the operating environment, articulating a shared vision, and developing / readjusting / affirming priorities. Participatory approaches to planning enable many people to understand the “big picture” and feel a sense of responsibility for the whole organization. Issues of leadership succession can be addressed naturally as part of planning.



5. **Invest in adequate salaries and benefits, including retirement benefits.** Provide fair compensation to all staff, including the executive director/CEO, and ensure internal equity in compensation (e.g., lowest paid employees are paid a living wage, second highest salary is not wildly lower than the executive’s salary, etc.)

6. **Make sure the executive director/CEO job is “doable.”** Review and update the job description. Delegate and/or provide cross-training in some aspects of the job.

7. **Create an emergency executive succession plan. Test the plan before you need it and evaluate the results.** A sabbatical or vacation provides an ideal opportunity!