

# Pre-Succession Planning

Preparing yourself and your organization for the next chapter

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Community Engagement Institute

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# Agenda

- Introduction (to us, you, and succession planning)
- Prepare
- Pivot
- Prosper
- What you can do now

# Who are we?



## **Seth Bate**

Facilitator

- Leadership coach
- Local historian
- Hot toddy mixer

## **Carri McMahon**

Facilitator

- Nonprofit consultant
- Animal foster mom
- Fearless DIY-er



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# What to expect

- Overview of the succession planning process
- Steps you can take now to prepare your organization for future transition
- Doesn't include:
  - Fully preparing for transition
  - How to conduct an executive search, finding candidates
  - How to structure your learning and development

# Advocate for your learning

- Get what you need out of today
- Feel free to ignore / mentally file away what doesn't fit for you
- We will mostly be talking about executive succession, and we can also apply many of the ideas to other key staff positions
- You will learn more if you participate more — and life is complicated

# Some things that "prepare" might include

- Establish a transition planning team
  - (Don't try do this all by yourself!)
  - Determine role of ED in the transition
  - Agree on notification period for vacating position
  - Earmark funds for search process

# Some things that "prepare" might include

- Establish and grow a leadership development process and talent pipeline
  - Where does your "hi-po" list live?
- Assess board governance, oversight, and relationship with ED
- Review / update strategic plan
  - Get clear on the priority challenges and opportunities for the organization

# Prepare

So how ya doin'?



# Some things that "pivot" might include

- Acknowledge the legacy and achievements of departing ED
- Activate transition planning team and reform into transition team
- Communication plan
  - Notify key partners / vendors
- Establish interim or acting management
  - Consult regularly with board
- Seize the opportunity to evolve as an organization
- Conduct a successful search
  - Remember your hi-po list

# Pivot

Tell us some war stories!

# Some things that "prosper" might include

- Create ongoing board/ED communication patterns
- Commitment to ongoing learning in the organization
  - Plan for ED skill development, especially for first-time ED
- Avoid the post-transition sleep
  - Or at least make it a catnap

# Prosper

What's your level of confidence that your org will prosper?

# Prepare

# Emotional preparation

- What do YOU need to prepare for?

# Emotional preparation

- What do YOU need to prepare for?
- Long-timers? Founders?

# Emotional preparation

- What do YOU need to prepare for?
- Friends at work? Attachments to persons served?



# Emotional preparation

- What do YOU need to prepare for?
- Your own identity?



Take a Break

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# Pivot

# I think I'm a clone now ...

- More than one thing can be true.
- You are awesome.

AND

- Your organization (probably) does not need You Part Two

# I think I'm a clone now ... action questions

- What skills / attributes do you provide your organization? How are you growing those in others?
- What gaps or blind spots do you have? How could a future hire shore those up?

# I think I'm a clone now ... action questions

- What challenges / opportunities are clearly on the horizon for your organization?
- What skills / attributes would set a future hire up to make progress on those?

# I think I'm a clone now ... action questions

- What are some core values of your organization that should not change in a transition?
- What does your transition team need to pay attention to in order to preserve those?

# Prosper



# Map your network

- Future work — mentally file this away
- It matter who knows you!

# Growth mindset

- Cannot be "fix it and forget it"
- Employee development should be the focus
  - Employee ambition should be supported, including any "not this time" employees
  - This includes the new ED
- Board feedback, communication, and initial 90-day performance measures are important

# Growth mindset

- If you were the new hire:
- What would "supporting the new ED" look like?
- Be specific!
- Let's identify at least 10 concrete ideas.

# Growth mindset

- How will you challenge the unicorn myth?

# Growth mindset

- Organizational goals must be employee goals.
- How are you doing this now?
- How could you lean further into this?

# Veteran paradox

- You are an expert at operating in your system the way it is.
- You need the system to evolve to what it needs to be.
- How do you navigate this now?

# Veteran paradox

- You are an expert at operating in your system the way it is.
- You need the system to evolve to what it needs to be.
- How do you navigate this now?
- How would you balance this as it "reads in" and gets to know a new ED?

# What you can do now

- Assess your organization and board
- Engage your board
- Identify key supports