

## SUCCESSION PLANNING

The hard truth is, everyone eventually leaves a job. Yet often Nonprofit Boards of Directors and Executive Directors are uncomfortable talking about succession planning.

It's kind of like the proverbial elephant in the room...everyone sees it; everyone knows it's there, but no one wants to acknowledge it.

"Boards avoid the discussion because they don't want EDs to be offended by the conversation - offended to think the board is raising the issue because they are considering getting rid of the ED, when all they are trying to do is protect the organization from the inevitable, whenever the inevitable occurs.

EDs avoid the discussion because they don't want their boards to worry that they might be considering leaving.

In our experience, the reason boards and EDs alike avoid this conversation is because they don't really know what to say or what to do. They know they should do something to plan, but what?" Heidi Gottlieb, Resolve, Inc.

So what are some key elements of a succession plan?

- Focus on systems, not individual people. Move away from an organization where key people keep information in their head to one in which key information is routinely documented and accessible to those who need it in times of change. And that goes for all key staff - the Executive Director, and any other critical positions.
- Succession planning is the board's responsibility. If there are no systems in place to ensure things will run smoothly in the event of the sudden departure of a key employee, who is accountable? With the board sitting in that box at the top of the organizational chart,

the board is accountable for ensuring the smooth operation of the organization. That doesn't mean the board has to DO the work, but board members do have to ensure the work will get done. As the ED's boss, it is further the board's job to ensure there is a succession plan in place.

- If the ED does not have a succession plan for his/her own key employees, it is the board's responsibility to ensure he/she creates one. Again, it is not the board's responsibility to create that plan for the other staff, but they are accountable for ensuring such a plan exists.
- Start with current job descriptions, and if there are not any, get them written.
- Get a list of daily, monthly, quarterly and annual tasks for the position.
- Have the person in the position fill out a 1 year calendar, noting events, and things that regularly happen during the year.
- Have the person in the position make a list of where “key items” are, such as keys, licenses, statements, check books and so on.
- Have the person in the position make a list of key or critical contacts such as CPA’s , bookkeepers, lawyers, community contacts, funding contacts, caterers, etc.
- Make sure the donor list is complete, in writing, and intact.
- Require that cross-training occurs. Ensure that at least one other person knows how to handle key aspects of each job.
- Monitor the plan. Succession planning is an ongoing challenge!