



## Developing and Planning Leadership Succession

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### What is Leadership Succession Planning?

*Succession Planning can be defined as a purposeful and systematic effort made by an organization to ensure leadership continuity, retain and develop knowledge and intellectual capital for the future, and encourage individual professional growth and development.*

Source: HR.com

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### Are You Prepared?

- Only 14% of those surveyed said that their organizations were well-prepared for the loss of a key person.

Source: Florida Society of Association Executives and American Management Association

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### If No Succession Plan?

- Threatens the continuity of an organization, as well as the loss of key professional resources / community.

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### “Begin with the end in mind” – Stephen Covey

- In order to ensure the best Leadership Succession Planning outcomes:
  - Align your organization’s Succession Planning Strategy with your organization’s Strategic Plan
  - Build the candidate “success profile” to meet / exceed Strategic Plan Goals and Key Performance Indicators (KPIs)

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## What is Strategic Planning?

“Strategic Planning is the process by which the guiding members of an organization envision its future and develop the necessary procedures and operations to achieve that future.”

*Applied Strategic Planning by Goodstein, Nolan & Pfeiffer, 1992*

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## Identifying Internal Leadership Candidates

- Succession planning: ensuring a suitable supply of successors for future leadership roles
- Planning includes:
  - Determine projected need
  - Audit current talent
  - Identifying leadership paths
  - Career / leadership counseling
  - Accelerated assignments
  - Performance-related training
  - Planned strategic recruitment
  - Placement

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- ### Strategic Leadership Pipeline Building
- Identify the characteristics needed, e.g. a job description with key competencies
  - Scouting for candidates from within
  - Mentoring and Nurturing
  - Educating and Experiential Learning
  - Must be open to all options
- Source: Florida Society of Association Executives
- Deb Best Practices - www.DebBest.com 11

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- ### Succession Planning Design
- Answering the Key Questions
- ✓ What percentage of key positions should have at least one identified successor?
  - ✓ How should high-potential members be prepared for advancement?
  - ✓ What are the respective roles and responsibilities of current organization leadership in the process of preparing high-potential / designated successors?
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## Succession Planning Design

Answering the Key Questions

- ✓ How important are individual members' goals and objectives in the succession management plan?
- ✓ How open and transparent should current leadership be in communicating with individuals who are identified as high-potentials and designated successors?



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## Internal Recruiting: A Year-Round Job

- Develop a year-round, ongoing process for continued relationship-building and candidate pipelining
- Network, Network, Network



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## Pipe-lining / Growing Leadership Talent from Within

- Keep contact with interested individuals
- Provide opportunities for growth and leadership (Town Hall Meetings, Committees, Task Forces, opportunities to represent the organization)
- Provide or suggest education related to the position (Be clear of realistic expectation.)
- Person must possess the skills needed, not only be a "good member"

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### Examples of Strategic Leadership Competencies

- ✓ Creativity and Innovation
- ✓ Visionary Leadership/Passion
- ✓ Persuasiveness
- ✓ Strategic Planning & Execution
- ✓ Change Management
- ✓ Customer/Client Focus
- ✓ Ethics and Integrity
- ✓ Decisiveness
- ✓ Fundraising
- ✓ P&L/Financial Management
- ✓ Partnering & Teamwork
- ✓ Political Savvy and Executive Presence
- ✓ Influencing/Negotiating
- ✓ Communication Transparency



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### Identifying High-Potential Leadership Pipeline

Example: GE's 9-Box Talent Model



The 9 Box Talent Model

Potential ↑

Performance →

Albert D. McKimsey

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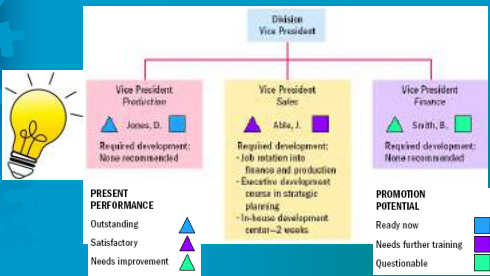
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### Sample Leadership Replacement / Promotion Potential Chart



Division Vice President

Vice President Production: Jones, D. (Blue triangle)  
Required development: None recommended

Vice President Sales: Able, J. (Purple square)  
Required development: - Job rotation into Finance and production  
- Executive development course in strategic planning  
- In-house development center-2 weeks

Vice President Finance: Smith, B. (Green square)  
Required development: None recommended

**PRESENT PERFORMANCE**

Outstanding (Blue triangle)

Satisfactory (Purple triangle)

Needs improvement (Green triangle)

**PROMOTION POTENTIAL**

Ready now (Blue square)

Needs further training (Purple square)

Questionable (Green square)

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## Potential Leadership Succession Planning Ideas & Solutions for Your Organization

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## Ideas & Solutions

- Consider developing a one-page Strategic Plan, which in turn will drive a more focused Leadership Succession Plan



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## Ideas & Solutions

- Seek out members with skills and an interest in leadership (Refer to your Success Plan / Matrix)
  - “Up-and-comers”
  - Change Agents / Visionaries
- Standardize committee roles
- Streamline / update meeting methods and governance

Source: Association of Fundraising Professionals

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**Ideas & Solutions** 

- Assign responsibility for Succession Planning to your Immediate Past-President
- Create a Volunteer Coordinator position on the Board
- Develop a Mentorship Program for incoming leaders

Source: Association of Fundraising Professionals

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**Ideas & Solutions** 

- Develop a “two-deep” leadership system with every position having a vice-chair
  - Ensure this exists “at least” for critical positions (President-Elect, etc....)
- Discuss the importance of board members not doing all the work themselves
  - Break tasks into small pieces and form Task Forces, so volunteers will have the time to help
  - Engagement leads to involvement, which leads to *Leadership Pipeline*

Source: Association of Fundraising Professionals

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**Ideas & Solutions** 

- Engage non-board members on committees
- Establish a “career path” guideline that outlines the volunteer roles a member must have held before being eligible for a board leadership role
- Hold social gatherings and networking opportunities to seek those who may have an interest in board service

Source: Association of Fundraising Professionals

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## Ideas & Solutions

- Develop a Board Recruitment Matrix (skills / expertise / diversity), taking a page from GE's matrix
- Include co-chairs / chairs-elect in board meetings so they are knowledgeable about the issues
- Make Succession Planning a regular Board meeting agenda item
- Plan far in advance

Source: Association of Fundraising Professionals

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## Questions? Best Practices to Share?

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## Thank you!

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