

Succession Planning Workshop

January 5, 2024



Agenda

- 10:00 - 10:15 Welcome & Introductions
- 10:15 - 10:25 Why Succession Planning
- 10:25 - 10:50 Succession Planning in Action
- 10:50 - 11:15 Assessing Your Organization's Needs
- 11:15 - 11:25 Q&A
- 11:25 - 11:30 Wrap Up & Closing

Objectives

- Understand the importance and value in succession planning
- Gain insights into best practices
- Gain new tools / toolkits to support succession planning
- Meet and learn with and from your colleagues





Succession Planning

Proactive and ongoing process to align an organization's needs with its **staffing skills and capabilities**. Prepares your staff and board for any type of transition across the organization.

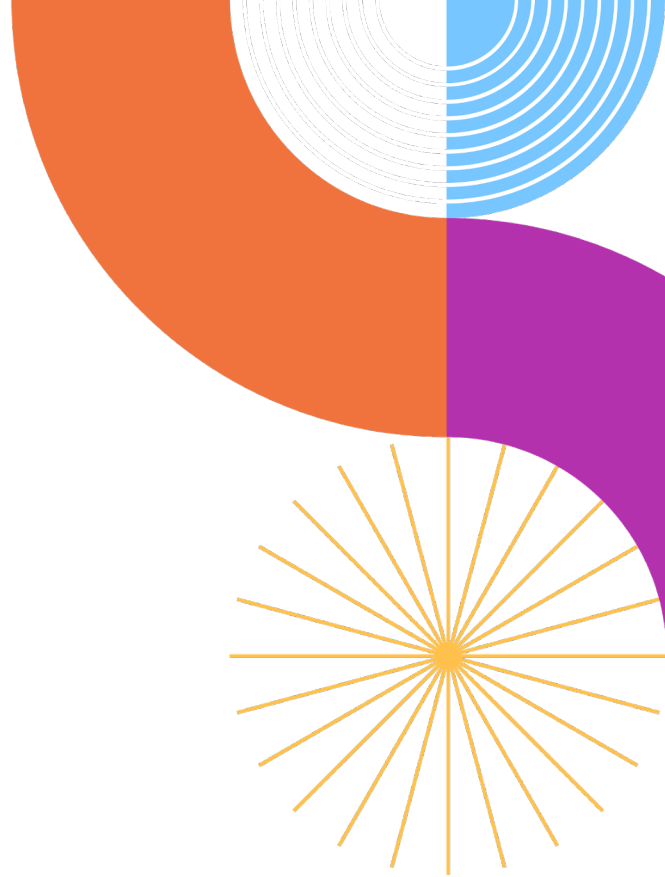
- Not only for executive leadership transitions
- Not only for someone quitting or being fired
- Not only for board chair transitions

Cultivating internal professional and lay leadership.



Benefits

- Reduce the negative impacts of transition
- Opportunity to clarify roles and goals
- Opportunity to identify and energize potential leaders
- Minimize chaos and disruptions
- Preserve knowledge and expertise





Staff Succession Planning



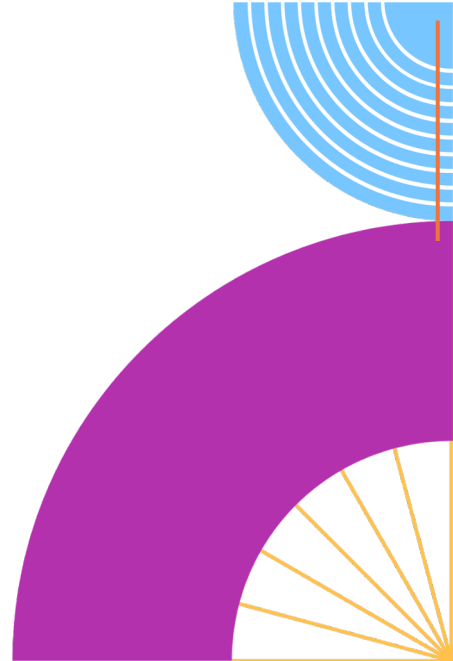
In Action



Assess Where You Are

Talent / Staff

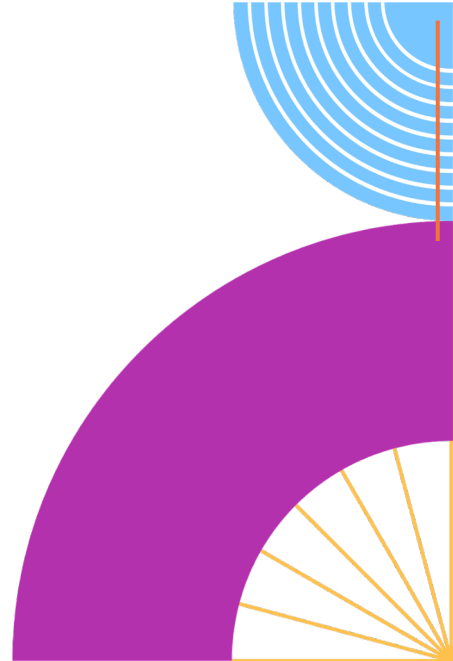
- Identify organizational needs over next 2-3 years
- Identify key positions, skills, knowledge, relationships needed to ensure organizational success
- Determine level of skill, knowledge, relationship redundancies or gaps in critical areas
- Identify potential internal leadership



Assess Where You Are

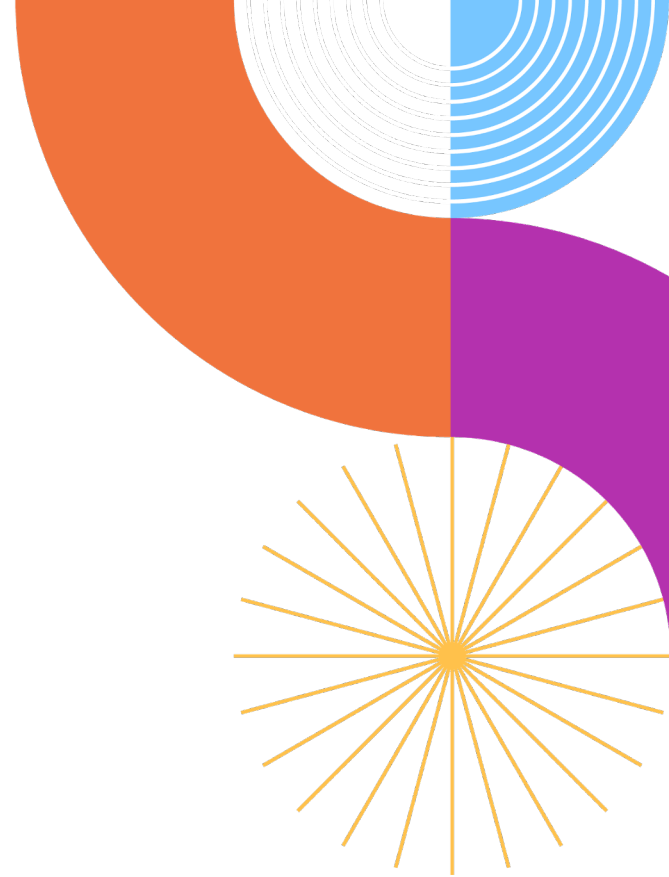
Policies and Procedures

- Identify systems that are necessary for the organization to operate effectively
- Assess level of training and redundancies on needed systems
- Determine level of documentation of systems, processes, and policies



Develop & Train

- Invest in potential leaders
- Invest in building redundancies
- Begin transfer or sharing relationships
- Train around skill and knowledge gaps





Document

- Capture knowledge individuals have around key areas of organizational functions
- Codify and train around key practices, systems, processes
- Map work flows (coverage) in the event of a change

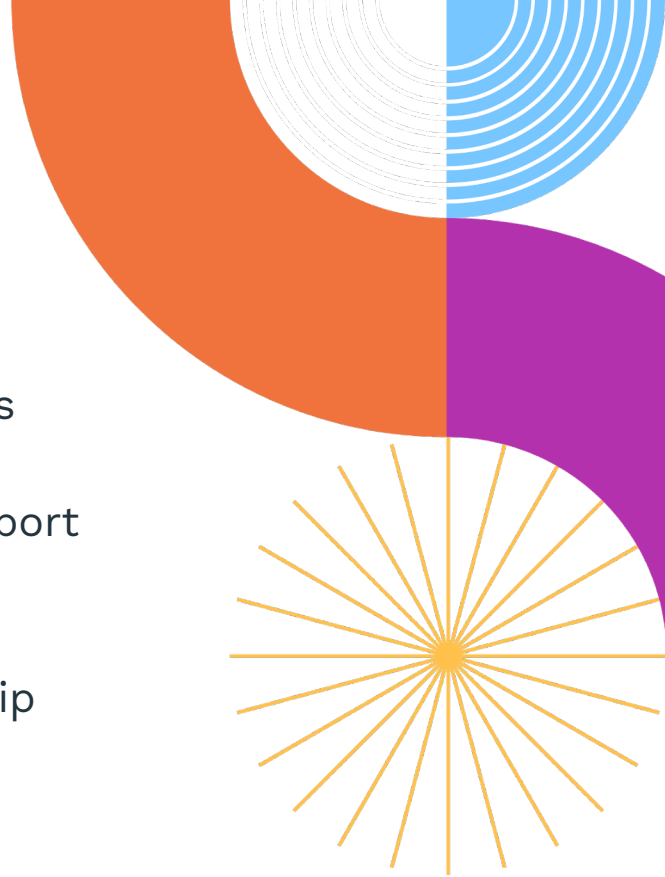


Board Succession Planning



Assess Where You Are

- Identify organization needs over next 2-3 years
- Identify needed skills, knowledge, and relationships
- Determine necessary level of engagement and support needed
- Determine potential internal and external leadership pipeline



Develop and Train

- Conduct a skills audit
- Invest in training and development around key skills and knowledge areas
- Begin transfer or sharing of relationships
- Ensure “job description” or board role expectations are up to date
- Ensure bylaws and governance structures are up to date and serving the organization’s needs
- Engage full board or governance committee in pipeline development



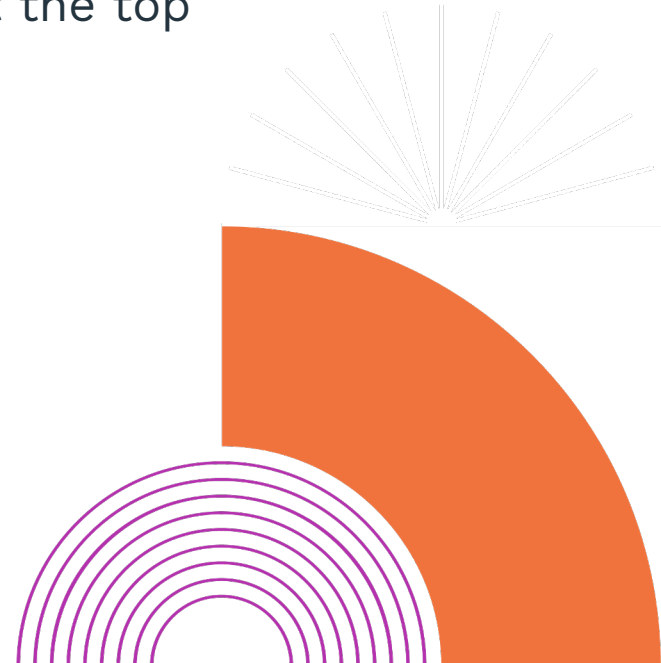


Summary / Best Practices



Best Practices

- Root in strategy or organization goals
- Build redundancies at key positions, not just the top
- Build relationship redundancies
- Update and maintain documentation
- Create a transition fund
- Center DEI
- Communicate
- Engage board in shared leadership







Small Group Discussion



Review the Succession Planning Risk Assessment Tool for your individual organization. Consider the following questions with your peers:

- *Do you feel your organization is well positioned in the event of a staff or board transition?*
 - *Where do you see areas of strength at your organization around managing transitions? Where do you see gaps or concerns?*
 - *What steps could you take to support stronger transitions in the future?*
 - *How do you see board and staff working together around succession planning?*
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Q&A