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Focus on the organization for effective leadership transition planning

The board and administrator should give full attention to the process of leadership planning so that when you leave your job, another individual who shares the organization's mission, vision and values is ready to take over the top executive's position.

That's the consensus from a consultant's roundtable convened by Terrie Temkin, CoreStrategies for Nonprofits, Inc., Miami, Fla. Temkin moderated the roundtable which included Margaret Donohoe, Leadership in Transition, San Jose, Calif.; Susan Egmont, Egmont Associates, Boston, Ma.; and Tim Wolfred, Psy.D., Senior Projects Director, Compass Point, San Francisco, Calif.

Transition planning is not necessarily identifying an individual to come in and be groomed to move up the ladder, according to the roundtable participants.

"Succession planning is taking the steps that will leave the organization in good shape," Wolfred said. Here are the key points the board and CEO should consider when making leadership transition plans.

View the concept as leadership planning

"The process is much broader than simply grooming an individual," Donohoe said. "It's the process of ensuring consistency of the organization's mission, vision and values."

That responsibility lies with the administrator, Egmont said. "What do you want to have happen in the time you are there?" she asked. Part of the job is making sure the organization is ready for your departure, she said.

Take the mindset, "It's not about one person, but instead the entire organization."

To prepare for a successful transition, it's important to build skills and spread knowledge throughout the entire organization, Wolfred said. "Talk about succession planning as leadership planning that happens with the strategic planning work you do," he said.

Donohoe said CEOs can be uncomfortable with the concept of finding a successor. This can be avoided if you take the personal context out of it, and focus on the concept as leadership planning for the organization's future, she said.

"To accomplish this, you need solid systems for setting policy, strategic planning, and board committees so that when the leader steps away, it's not about who comes in, but instead the fact that you have a strong organization not centered upon a single leader," Egmont said.

"The executive director has to leave behind the 'This is my job' attitude and instead build systems

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within the organization aligned with the same vision,” Donohoe said.

When you consistently plan and develop the organization with an eye on succession, you avoid problems with the administrator’s replacement, Egmont said. “What often happens is you bring in another CEO and that person becomes an unintentional interim executive because no one in the organization gave the transition a great deal of thought,” she said.

Alternatively, there may be value in hiring a temporary interim executive director to bridge the gap between the organization’s leaders, Egmont said. “This allows changes to occur and for everyone to get used to the fact that things don’t have to be done the way they always have been,” she said. “That can make the leadership transition steadier.”

Understand the mindset of Founders or long-term CEOs

“It’s important to impress upon a Founder or long-tenured administrator that leaving well can be a legacy in itself,” Egmont said. “Welcoming change is one way to do that.”

We’re often remembered more for what we left than what we actually did, Donohoe said.

One way for the Founder or long-term CEO to leave well is for him to serve as a coach during the transition period, Wolfred said. “That can make the transition smoother for the person coming in,” he said.

The board must be healthy for effective transition in the administrator’s position.

One method to accomplish this is to perform a “gap” analysis of the current board to determine how to fill any board skill between where the organization currently is and where it plans to go, Donohoe said. “Fill the gaps on the board with people who can help you get there,” she said.

Prepare for the unexpected

- **Younger people are not getting hired for the top-level position in the organization.** That’s because boomers are healthy and hanging onto their jobs. It’s also due to the fact that search committees are risk averse and want expe-

4 tips for leadership transition success

1. **Don’t rush.** Take advantage of the developmental aspects of this time, said Egmont. “Remember, it’s a journey,” she said.

2. **Consider sabbaticals.** “Sabbaticals provide a good opportunity for leadership development while the CEO is still with the organization, but on leave,” Wolfred said. “The rest of the organization can breathe, look around and determine how they want to develop,” he said.

3. **Make leadership development organic.** Donahoe said the transition process should be built into the organization’s every day work. “It encompasses all aspects of the organization, so don’t try to separate it, but instead keep it part of the whole,” she said.

4. **Seek funding.** “Funders see leadership development as a ‘best practice,’” Wolfred said. “More and more they want to provide financial support for helping organizations develop a succession plan.” ■

rience in the executive director’s position, Temkin said.

“It’s the Prince Charles syndrome,” Temkin said. “We will probably skip a generation from the boomers to the Y’s before we see younger CEOs in the position.”

- **Expect rough waters the first year of the leadership transition.** Egmont said that the first year requires a serious time commitment and investment of emotional energy. “It’s always difficult that first year, learning the culture of the organization, working with new people and resistance to change,” she said.

- **Expect to revisit old business.** “Every issue that has ever been tabled will come back to rear its head and will need to be addressed,” as a new leader takes over the organization, Donohoe said.

For information, Terrie Temkin, Miami, Fla., www.corestrategies4nonprofits.com; Margaret Donohoe, Leadership in Transition, San Jose, Calif., www.leadershipintransition.org; Susan Egmont, Egmont Associates, Boston, Ma., www.egmontassociates.com; and Tim Wolfred, Psy.D., Senior Projects Director, Compass Point, www.compasspoint.org. ■