

Nonprofit leaders will be leaving their organizations at a staggering rate in the next few years. Many are long-time leaders or founders, and it is very difficult for new leaders to follow these folks. Organizational sustainability depends on how the board, departing leader, and staff manage the transition.

The following points will help your succession planning and management.

1. **Warning signs** when a founder or long-term leader is in place and begins to accrue disproportionate power. If you see any of these, take action to reverse the dysfunction.
 - a. The organization is overly-identified with the leader
 - b. The leader is at the center of all decision-making
 - c. The organization becomes reactive, rather than proactive
 - d. There is little input from staff or board into decisions
 - e. Staff are valued for their loyalty, not their ideas, surrounding the leader with cheerleaders
 - f. There is limited professional development of the staff, which reinforces the leader's influence
 - g. The board's role is to "support" the leader rather than lead the organization
 - h. The board doesn't probe financial or programmatic questions
 - i. Panic and urgency surround the leader's decision to depart
 - j. No succession plan exists
2. **Strengthen the board** and prepare it for leadership & governance. The founder must allow the board to take a more active role.
3. **Form a board Transition Committee**
 - a. Short-term: prepare a plan in case of an unplanned exit of executive director or other key leader
 - b. Long-term: prepare a plan to transition the next executive director in to the organization
 - i. Confront this openly to mitigate fears
 - ii. Clearly articulate the key competencies needed for the future
 - iii. Provide change management training for staff & board to clarify the change process and give space to talk about anxieties & concerns.
4. **Things to do and to avoid** (your checklist)
 - a. Have a clear board succession plan in place (short-term & long-term). Tie it to the strategic plan
 - b. Create a transition committee that is led by the board and includes staff input
 - c. Keep the board fully informed about financial and operational matters
 - d. Obtain feedback from all stakeholders when assessing needs for the Executive Director position
 - e. Provide opportunities for board & staff to address succession issues honestly and openly
 - f. Clearly define the role of the departing leader *during* and *following* the transition. It is ill-advised to have the departing leader serving on the board. If the departing leader continues to be involved in any way, draw up a contract/agreement to be clear s/he won't be in a decision-making role.
 - g. Consider retaining consultants to help manage the more challenging aspects of the transition
 - h. Provide coaching for the new executive director & leadership team throughout the transition
 - i. Initiate your succession strategy *before* the planned departure of your chief executive