

Why Succession Planning Is an Outdated Concept – & What to Do Instead

You still have to plan – but here's a better way.

By Miecha Ranea Forbes

Many nonprofit organizations are experiencing leadership transitions. And when a high-level leader leaves, it can be very disruptive if there's no plan to ensure a smooth transition. This is especially true when the departure is sudden and unexpected.

Create an Intentional Pathway

In the past, organizations have been encouraged to focus on “succession planning” – the process of identifying a successor for a specific leader. That term – and concept – is outdated.

Instead, take a more holistic approach – planning for leadership change *beyond just a single role or person*. Don't just “succession plan” for an executive director role but, instead, take a mindful, bigger-picture approach that prepares for leadership changes *in all key roles, including the board*. Think of this effort as “intentional pathway planning.”

Intentional pathway planning does two essential things: **It ensures stability, sustainability, and continuity** when any high-level leader leaves the organization.

It develops talent within the organization, ensuring a robust leadership pipeline.

To accomplish those two key things, you must:

Be proactive in planning for people's departures. Develop a plan that covers all key leadership positions in your organization.

Prepare current employees for high-level roles with training and mentoring.

Be aware of knowledge gaps and diversity gaps that need to be addressed and resolved.

Provide leadership and growth opportunities for all staff and board members.

Consider your organization's overall goals, strengths, weaknesses, threats, and opportunities when making your plans. Ask yourself: What type of leader do you need to help you overcome challenges, maximize opportunities, and inspire positive change?

“**Prepare for changes in all roles, including the board.**”

These efforts should be ongoing – not last-minute, reactive, or occurring only when you realize that someone's preparing to depart.

Only about a quarter of nonprofits (27%) have a written transition plan in place, according to BoardSource's “Leading with Intent” report (boardsource.org). That means most organizations will be vulnerable when any leader leaves. And only a third (33%) of executives responding to the “Daring to Lead” survey (daringtolead.org) are very confident that, when they leave the organization, their boards will hire the right person to replace them.

It's essential to plan for leadership transitions, including both expected and sudden departures at all senior levels. Following are some crucial tips for intentional pathway planning.

Think Holistically

Begin by looking at your organization's goals. What are you trying to accomplish? Are you looking to expand, change direction, adjust priorities, increase fundraising, elevate communications? What type of talent do you need to reach these goals?

Determine the gaps (knowledge, skills, diversity, etc.) that need to be filled.

Think about your current team and determine who could potentially take on an elevated role. Dig deep to reveal both obvious and hidden talents that your team members possess.

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Visualize Your Future Leadership Team

Identify challenges that your organization faces or may face in the future. Ask:

- **What type of person** will help you overcome these challenges, navigate obstacles, and meet goals?
- **What skills, qualities, and personality traits** will be most effective to inspire the positive change you envision?

Gather input from your board, as well as staff at all levels of the organization, about what qualities they'd deem most critical for future leaders. If your organization doesn't have a competency model, this could be the beginnings of one.

Assess current staff to see if they have the qualities and capabilities you need, and determine what types of training are necessary to help elevate them to higher roles.

Note what skills, experiences, and traits are missing internally so you can recruit and hire external candidates that fill those gaps.

Forge a Path to Great Leadership

Be sure you're following legal guidelines and keeping your organization healthy and sustainable with a diverse, passionate group of leaders at the helm. See articles such as these at NonprofitWorld.org:

[Are You Risking Legal Action because of Discrimination?](#) (Vol. 38, No. 4)

[What to Do Before a Long-Term Leader Departs](#) (Vol. 30, No. 5)

[Why Wisdom Is Being Lost – and How You Can Capture It](#) (Vol. 27, No. 6)

[Don't Be Sued for Negligent Hiring](#) (Vol. 21, No. 3)

[Grounded Visioning: A Quick Way to Create Shared Visions](#) (Vol. 26, No. 4)

[Do You Know Where Your Goals Are?](#) (Vol. 26, No. 5)

[Avoid the Selfish Factor: Plan for Succession with Four Simple Rules](#) (Vol. 36, No. 2)

[Coach! The Skill Every Leader Needs](#) (Vol. 37, No. 1)

[Manage for Today, Mentor for Tomorrow](#) (Vol. 23, No. 5)

[The Failure of Diversity Training](#) (Vol. 18, No. 3)

[Hire the Best But Hire with Care](#) (Vol. 20, No. 6)

[Creating a Values-Based Road Map](#) (Vol. 23, No. 2)

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[Board Diversity: Your Biggest Challenge](#) (Vol. 27, No. 3)

Focus on Training & Development

The importance of developing people's talents and providing the right training cannot be overstated. Put your focus on these steps:

Provide employees with strong mentoring and coaching.

Ask team members about their goals and aspirations, then create individual development plans that reflect these things.

Offer ample opportunities for employees to take on additional responsibilities to prepare them for future leadership roles.

Proactively and continuously prepare people with robust training and educational opportunities to help them grow and thrive.

Know When to Promote from Within & When to Hire Externally

There are proven benefits to promoting from within.

These include improving retention and morale, capturing institutional knowledge, and increasing employee engagement. Additionally, it's less expensive and time-consuming to promote an internal candidate than to conduct an external search.

Sometimes there are valid reasons to hire external talent. Perhaps you don't have the internal skill sets, experience, or other key criteria necessary for the roles you need to fill. Also, it can be valuable to bring in external talent to boost diversity within your organization, especially if your team is homogenous in terms of age, gender, race, background, and other factors. It's critical to support these new team members as they onboard and acculturate to your environment.

Use Consistent Systems

Be sure you have an effective, consistent performance-management process to capture assessments and track professional development opportunities. These tools are crucial in assessing your leadership team, determining its deficits, identifying where knowledge gaps exist, and training to fill those gaps.

Use the performance-management process to demonstrate equity and fairness: Show that decision-makers used specific criteria to assess and select talent for leadership roles. Doing so will enhance staff morale, retention, loyalty, and engagement.

Expect the Unexpected

Ideally, people will give plenty of notice about their planned departures and then help recruit, hire, and train their successors. Yet, sometimes a leader's departure is abrupt and unexpected, due to a health issue, family crisis, or even a sudden death.

Having a plan in place will help ensure a smooth leadership transition, regardless of the circumstance, and will provide a helpful roadmap during a difficult and potentially emotional period. Create an emergency plan to clearly outline the delegation of duties and authority. Ask yourself these questions:

If there's an unexpected interruption in leadership, who will fill in while a replacement is secured?

What immediate actions must be taken to ensure your organization's stability and sustainability?

Prioritize the Pathway-Planning Initiative

Be certain that someone is championing your intentional-pathway-planning effort, embedding it in the budget and into strategic goals, so it remains top-of-mind and doesn't get overlooked when things get busy.

Set expectations for this initiative, put processes in place, assign responsibilities to specific teammates, and hold people accountable.

Customize Your Plans

Move past succession planning, which only addresses the plan for one specific leader's transition. Think broader, addressing possible future departures for all high-level positions. This could include executive director, CFO, CHRO, development director, major gifts officer, and public affairs director as well as board members.

Since each position requires different experience, skills, and personalities, your plan should address all possible vacancy scenarios.

Communicate Wisely

Include communication efforts in your plan. When your organization has a change in leadership, it's important to communicate this transition to key stakeholders, including staff members, donors, partners, board members, media, and the community.

Identify possible spokespeople, and make sure they understand what the role of spokesperson entails, feel comfortable with it, and are ready to take it on.

Recognize that the circumstances of the transition will dictate the specific messages around it. Address and alleviate possible concerns for internal and external audiences during this time of transition and uncertainty.

The smoothest, most seamless leadership transitions happen when there's a plan in place, regardless of the vacant roles or the circumstances. Taking a holistic, proactive, thoughtful approach to intentional pathway planning will help your organization prepare for inevitable leadership changes and make sure transitions happen smoothly. 

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