Be Ready when Key Staff Members Leave

Staff can cause turmoil when they depart – unless you have a succession plan.

By Erin Gloeckner

Eureka moments often occur when nonprofit teams realize the CEO is one of many individuals whose departure could cause transition trauma. Read on for inspiration for establishing a non-CEO succession planning process.

Why Succession Planning Is NOT Defining a Successor

Many organizations practice the literal form of succession planning – defining a successor or #2 person waiting in the wings. But this approach is problematic since many nonprofits are too small to have an internal pool of back-ups for key positions. Plus, any nonprofit leader would be woefully naïve to believe that a talented, C-suite staffer would wait around for a chance to take up the mantle as a key player on the team. And if your designated successor departs for any reason, then the succession plan is suddenly kaput.

Instead of defining actual successors for leadership roles, succession planning should be about having a plan in place to manage staff transitions. Using CEO succession planning as an example, the board is charged with establishing a plan that it will implement when the existing CEO is suddenly unavailable or decides to leave. The succession plan should provide instructions – originally developed and approved by the board itself – that the board will now follow to conduct activities including:

- **determining any shifting needs** the nonprofit has for its incoming CEO
- **revamping and advertising** the CEO job
- **filling the role temporarily** with an internal or external candidate
- **vetting CEO candidates** and then hiring the selected candidate
- **managing** the transition
- **onboarding** the incoming CEO when the time is right.

Now that we've cleared up what succession planning is and isn't, how can we apply this critical process to non-CEO roles?

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All Aboard the Succession Planning Train

There are three preliminary steps to complete before beginning the succession planning process for any role. Conducting these three activities regularly will create a climate for effective succession planning at your nonprofit:

Adopt and follow a performance review process for key roles. This process will empower your nonprofit team to assess and reshape leadership roles as the organization's priorities change.

Keep position descriptions up to date for all key positions to ensure that day-to-day duties and overarching goals are fully understood.

Offer cross training, and clarify back-up personnel for key activities. Doing so will prepare your team for temporary succession solutions (for instance, in the event of an unplanned departure in which department staff must take on a department head's duties).

If you're confident that the activities above are occurring at your organization, then you've laid the groundwork for managing leadership transitions. Now it's time to adopt an approach to succession planning.

Depending on your organization's size, complexity, and culture, your approach to non-CEO succession planning could be either formal or informal for certain roles. Generally speaking, succession planning for non-CEO roles will be far less formal than CEO succession planning, since there's no need to engage the board in planning for leadership transitions of other key staff.

It's a good idea to use a collaborative approach, letting the relevant departmental or functional teams participate in the search and hiring process for their own staff colleagues and even department heads. Team-based hiring enables you to select new hires based on the perspectives of your diverse team members. Such collaborative hiring also encourages the recruitment of new staff leaders who are truly welcomed and approved by many of their soon-to-be peers and direct reports. These benefits can cultivate feelings of positivity and ownership among staff while reducing stress associated with leadership transitions.

> "The CEO is one of many individuals whose departure could cause transition trauma."

If your HR team typically takes the lead on employee recruitment, then consider involving both HR and the department that has open roles. Breaking down these silos will produce myriad benefits including:

- **gratification for HR staff** whose expertise might be overshadowed by the work of programmatic staff
- **an appropriate division of labor** between HR and the initiating department

- **less chance of inaccurate position descriptions,** unrealistic expectations for personnel budgets, and onboarding that's either too general or too role-specific.

If an executive staff member is leaving your organization, have one or more leadership team members (for example, other department heads or other C-suite leaders) collaborate with the departmental team of the departing executive. A similar approach could be used when planning the transition of any staff member within a specific department. A leadership representative and the department team can collaborate to facilitate informal, candid discussions about personnel priorities, using questions like these:

Is the staff member's position description up-to-date?

Are there any critical responsibilities (or personal qualities that the individual brought to our team) that aren't listed in the position description? (If the answer is "yes," update the position description accordingly.)

What elements of the role should remain the same in the future? What elements need to change based on our internal and external environments and any opportunities or challenges that lie on the horizon?

Are there any special considerations for the role based on other personnel gaps that exist within our department?

Are there any other personnel gaps in our department that could potentially be filled (or partly filled) by a single new hire? How might this type of role be structured or developed?

As we begin the search process, how will we support the departing staff member's role in the interim?

What critical responsibilities should be delegated to other members of our team for the time being?

Will the departing staff member be available to help onboard the new hire? If not, how will we capture and share the institutional knowledge needed to provide the new hire with a solid foundation during onboarding? If so, how can we ensure a positive and productive experience for both the exiting and incoming individuals?

As we identify candidates for the role, how do we foresee this transition occurring?

What can we do now to ensure that a smooth, positive transition occurs?

Are there any gaps we need to address in our screening, hiring, onboarding, or training processes?

> "Practicing the literal form of succession planning is problematic."

Whether it's your first foray into non-CEO succession planning, or you're a succession planning veteran just looking to revitalize your approach, your best bet is to rely on the intimate knowledge your own peers have of your organization. Leverage your team to cross-train each other and volunteer as back-ups to manage staff transitions and to seek out new colleagues who truly embody the spirit of your mission.

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No One Stays Forever: How to Be Ready

Whether it's the CEO or someone else who leaves your organization, be ready with articles such as these (NonprofitWorld.org):

Planning for Leadership Succession (Vol. 22, No. 4)

The Best Leaders Are Change Agents (Vol. 34, No. 1)

Executive Transitions (Vol. 16, No. 3)

Avoid Transition Trauma with a CEO Succession Plan (Vol. 39, No. 1)

Why Wisdom Is Being Lost – & How You Can Capture It (Vol. 27, No. 6)

Dealing with Change in a VUCA World (Vol. 37, No. 4)

How to Overcome Your Top Four HR Challenges (Vol. 35, No. 1)

Hiring a Concern? Learn What Talent Magnets Do (Vol. 24, No. 5)