The Five SAMHSA Funded National Consumer/Consumer Supporter Technical Assistance Center’s Present

The Peer Run Organization Learning Collaborative Webinar Series

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Handing Over the Keys: Leadership Succession in Non-Profit Organizations

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Learning Objectives

1. Define “succession planning”
2. Understand the need for succession planning as part of the strategic plan
3. Learn how to develop new leaders as part of a succession plan
4. Review tips for preparing for transition in Non-Profit organizations

Getting the Board on-board
Employee loyalty and buy-in
Succession Planning: Definition

The process of identifying one or more successors for key positions and preparing them for expanded organizational responsibilities through job assignments and other developmental activities.

“One of the things we often miss in succession planning is that it should be gradual and thoughtful, with lots of sharing of information and knowledge and perspective, so that it’s almost a non-event when it happens”

(Anne M. Mulcahy)
Let’s See How This Works

Dallas Cowboys 2015 Season: Tony Romo injury -> Brandon Weeden -> Matt Cassel -> Kellen Moore

Apple: Steve Jobs created Apple University to prepare for his imminent departure. Apple University has a leadership curriculum with content and materials based off of Job’s experiences.

NAMI

Kerzner International: CEO appointed successor, but the premature death of the successor sent company reeling. All the eggs in one basket scenario.
Necessity of a Leadership Succession Plan

Some questions organizations need to ask:

1. Who will fill the leadership position in the imminent future?
2. How will that effect their role/responsibilities?
3. Who will fill in for them?
4. Will this create tension in hierarchy, on teams?
5. How long will this last and what will be the resulting impact on the org?
Tips for efficient succession planning

1. Proactively plan for future leadership
2. Put the plan into action
3. Look for the right time
4. Allow time... lots of it
5. Ensure continuity
6. Establish a committee (or leader) to oversee the transition process
7. Create a defined set of deliverables
8. Communicate often and honestly
9. Exit (or transition to a new role) like you mean it
10. Remember it’s about more than you

Leap of Reason Ambassadors Community
LeapAmbassadors.org
Preparing Successors: Cross-Training

1. Prepare a bench
2. Can’t be seen as a weakness or ego issue to prepare a successor
3. Identify positions that cannot be held without being filled
4. Develop job descriptions, even if there are no plans to fill them right now.
Getting the Board on Board

1. Top-down and bottom-up approach
2. Clearly identify roles
3. Integration of staff
Employee Buy-In

1. Begin with transitions
2. Cross-training
3. Who is promotable?
Questions?
1. Graceful Exit: Succession Planning for High-Performing CEOs  
   https://lea.pambassadors.org/resources/ambassador-insights/ceo-succession/

2. Developing Leadership Talent  
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