



Leadership Succession Planning Within Domestic Violence and Sexual Assault Organizations

Ten Actions for a Successful Leadership Succession & Resources

Succession planning is the thoughtful and organized planning for transitions in key leadership positions for an organization. It supports the departing person, the incoming person, and the staff. Most importantly, succession planning helps preserve the mission, values, and sustainability of the organization.

Below is a list of strategies. Identify what may be helpful to your organization, use the action plan outline on page four, and consult the resources on page five and six, as necessary.

1. Conduct an organizational assessment and sustainability review.

- Review mission, vision, core values and direction of the organization.
 - ✓ Are we doing what our mission says we are to be doing?
 - ✓ What is the impact of services?
- Explore effectiveness, financial position, community engagement, board, leadership, and staff effectiveness.
- Gather input from departing ED, board, key staff, funders, and stakeholders.

2. Build and strengthen the organizational capacity and sustainability.

- Cultivate the leadership of staff at different levels.
- Reinforce infrastructure, policies, legal procedures, and staff performance evaluations.
- Ensure financial systems, reports, and reserves are in place.
- Share external relationships with internal leadership staff, including funders, donors, and community leaders.
- Incorporate succession planning into strategic planning.

3. The departing executive director/leader can support the transition.

- Continue to lead the organization and prepare the organization for new leadership.
- Engage in the orientation of the new director.
- Become a “Senior Advisor” or sounding board to the new leader, as necessary.
- Connect new leadership with contacts and introduce to funders.
- Agree on emeritus role, if possible and necessary.
- Commit to a departure date or date range.

4. Form a succession planning committee.

- Create and implement a succession development plan that is realistic and achievable. Consider the number of staff, capacity and any budget limitations.
- Draft a timeline for the upcoming leadership succession, including tasks and roles.
- Map out full executive search strategy.
- Seek volunteer, pro-bono assistance, or consultant assistance to help with executive search or other.
- Engage staff to:
 - ✓ Participate in a transition committee and take greater responsibilities.
 - ✓ Provide support for incoming executive director/leader.
 - ✓ Provide input about transition and desired new leader qualities.
 - ✓ Support with an assessment of organizational strengths and gaps.

5. Update job description and expectations for future executive director or leader to match organizational needs.

- Incorporate input from staff and board about the types of leadership qualities needed for the position.
- Describe the experience, competencies and skills required for the position, including desired management, strategic thinking, board oversight, staff management, and leadership style, (also identify the leadership style not desired).
- Contemplate new leadership styles when creating job descriptions and expectations, including shared leadership.
- Draft key criteria for vetting candidates and interview questions, including possible internal promotion.
- Identify expectations for the new executive's first 90 and 180 days, as well as for any other new leadership positions.
- Determine compensation for prospective leaders, including benefits and salary changes.
- Assess the need for a transition hire or interim executive director or leader, especially if organization has complex needs.

6. Define an internal and external communication plan for leadership transitions.

- Create an action plan with a timeline to communicate the transition and succession plan before, during, and after the transition of leadership.
- The audience for the communication should include staff, funders, major donors, civic leaders, and the community.
- Clearly explain in internal and external communications the rationale behind any changes and goals and objectives.



7. Promote the successful transition of new executive/leader.

- Provide goals and expectations for the successor, 90 days to one year.
- Develop a formal orientation and coordinate meetings with board, staff, funders, and community leaders.
- Support with resources, training, leadership opportunities, coaching, and community connections.

8. Hiring the executive director is one of the board of director's main functions. Depending on the structure and capacity of the board, they can:

- Support the current executive director with an annual performance review and strategic goals.
- Define the necessary attributes for the new leader.
- Ensure the organization has a financial reserve and resources are available to facilitate the succession plan process.
- Help strengthen the organization's infrastructure to attract new leader and set for success.
- Support with onboarding the new executive director.

9. Cultivate the leadership and skills of all staff that could advance or help strengthen the organization.

- Identify and create development opportunities for staff and board at all levels.
- Cross-train current staff to minimize the disruption from unexpected changes.
- Consider how to maximize the extent to which the leadership reflects the communities being served.
- Identify critical positions in the organization.
 - ✓ Establish a mentorship program/support.
 - ✓ Staff development, work plans, performance reviews, supervision.
- Reassign some responsibilities and tasks to potential leaders amongst staff to build leadership experience.
 - ✓ Gradually increase the program and budget decision making authority of key staff.
 - ✓ Raise visibility as leaders, both internally and externally.
- Identify if there are internal candidates for ED or leadership roles, including peers from other organizations.
 - ✓ Create clear and concrete development plan.
 - ✓ Focus on specific skills, expertise, and relationships.

10. Transfer of knowledge.

- Create a narrative form or a simple timeline of the story of the organization. How you got where you are today and context of where the organization still needs to go.
- Include important history and wisdom that must be shared with new staff and board members.



Next Steps Action Plan

Actions for a Successful Leadership Succession

A. What are three things that we could do to operationalize a leadership succession plan?

1.

2.

3.

B. What is our readiness or need to engage in leadership succession planning?

C. What are our vulnerabilities/gaps?

D. Who needs to be engaged and their roles?

E. What resources could we use or consult? (See attached list of resources).

F. Next steps:



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Resources Links

- [Building Leaderful Organizations: Succession Planning for Nonprofits](#) (Casey Foundation)
- [Communicating a Planned CEO Transition](#) (Board Source)
- [Exit Planning for Retiring Nonprofit CEOs](#) (Board Source)
- [Guide to Successful Nonprofit Executive Onboarding](#) (Compass Point)
- [Interim Executive Directors: The Power in the Middle](#) (Casey Foundation)
- [Nonprofit Succession Planning Toolkit](#) (Federal Reserve Bank of Kansas City,)
- [New Executive Director 90-Day Entry Plan \(Road Map\)](#)
- [Nonprofit Leadership at a Crossroads](#) (article, Nonprofit Quarterly)
- [Nonprofit Leadership Development: What's Your "Plan A" for Growing Future Leaders?](#)
- [Organizational Change and Transition Toolkit \(FUTURES\)](#)
- [Sample Interim Executive Director Job Announcement](#)
- [Sample Leadership Transition Committee Work Plan \(timeline\)](#)
- [Sample Executive Transition Timeline \(Boardsource\)](#)
- [Sample Emergency & Planned Succession Plans](#) (SOS Inc. & Child Advocacy Center)
- [Sample Non-Profit Executive Leadership Succession Policy](#) (Marquis-Duggan Non-Profit Sol.)
- [Sample Sustainability Audit, Anonymous Staff Survey](#)
- [Sample Sustainability Audit, Stakeholder Interview Questions](#)
- [Shared Leadership in Teams](#) (Center for Leadership and Organizational Effectiveness)
- [Steps to Success: Preparing for Leadership Transition](#)
- [Succession Planning Toolkit for Nonprofit Sexual Assault and Domestic Violence Organizations](#)
- [Succession Planning for Coalitions, Resource Sharing Project.](#)
- [Succession Readiness Checklist](#)
- [Succession Planning Discussions Sample Planning Templates](#)
- [Strategic Leadership Toolkit](#) (Executive Transition Initiative, Greater Milwaukee Foundation)
- [Structuring Leadership: Alternative Models for Distributing Power and Decision-Making in Nonprofit Organizations](#) (Building Movement Project)
- [Table for Two: Can Founders and Successors Co-Exist So Everyone Wins?](#)
- [Ten Ways to Set a New Executive Director on a Path for Success](#)
- [The Leadership in Leaving](#) (Decision making on leaving leadership position)
- [The Succession Planning Lens: Looking to the Future of Domestic Violence Organizations](#)



Sample Executive Director Transition Process & Announcement

- [Violence Intervention Project](#)
- [Washington Coalition Against Domestic Violence](#)
- [Blending Nonprofit Succession Planning and Executive Transition: A Successful Case](#)

Past Webinars with Resources - Links

[Succession Planning Within Domestic Violence and Sexual Assault Organizations](#)

[Providing Support Through Organizational Transitions](#)

[Support for your Organizational Infrastructure: What We Can Do For You](#) (Leadership Strategies)

[Workplace Policies and How they Support or Contradict Core Values](#)

[Leading with Emotional Intelligence](#)

[Compassion Fatigue & Self-Care for Individuals and Organizations](#)

[The Benefits of Mentorship: Empower, Lead, Succeed in Organizations Serving Survivors of Violence](#)

[Assembling the Pieces: Tools to Build an Effective Board](#)

[Secondary Traumatic Stress](#)

[Overview of Nonprofit Digital Strategy](#)

[Preparing for the Inevitable: The Board's Role in Succession Planning](#) (Nonprofit Quarterly)

Webinars on various topics organized by Futures Without Violence
<https://www.futureswithoutviolence.org/resources-events/webinars/>

SOS Institute Information, Resources & TA Support on Organizational Sustainability
<https://www.futureswithoutviolence.org/organizational-leadership-training/supporting-organizational-sustainability-training/>

For questions or additional information, please contact Futures Without Violence, attention Mónica Arenas: marenas@futureswithoutviolence.org.

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