SUCCESSION PLANNING
WITHIN DOMESTIC VIOLENCE AND SEXUAL ASSAULT
ORGANIZATIONS, PART 2

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Credit & Disclaimer

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Presenters

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As a result of this webinar, you will be better able to:

- Identify key elements of a departure defined (planned departure) leadership succession
- Explore a case study of succession planning
- Explore critical tools and resources for succession planning
Poll #1: What is your role at your organization?

- Executive Director
- Program Staff
- Board member (past, present, or future!)
- Other
Poll #2

How many of your organizations have succession plans?

- Yes, emergency succession plan
- Yes, planned (departure defined) succession plan
- No
- Don’t Know
What is succession planning?

“The thoughtful and organized planning for transitions in key leadership positions for an organization.”

• Supports the departing person, the incoming person, and the staff. Most importantly, the mission!

• Takes into account the culture of the organization, including its attention to diversity and inclusion practices.

• Involves Staff, Board, and Executive Director/Chief Executive Officer, even volunteers.
Sample Succession Experience

Violence Intervention Program, Inc. New York

- 35 Years as an organization
- 60+ Staff members/employees
Outgoing Executive Director Experience Process

- Retirement after 10 years as ED
- Spent about 3 years communicating to board intentions to retire
- 2 years before retirement, recruited deputy director as successor
- Board was part of the interview process (informally)
- Deputy Executive Director started in August 2017
- Prior ED’s retirement was announced internally in January 2018
Succession Plan for Leadership Transition – VIP Outline

1. Define organizational priorities for transition change
2. Form “succession steering committee” with board and staff
3. Work sessions to outline organizational priorities & plans
   a. Strategic planning review and update
   b. Mini retreat with board to identify needs from the board, roles, and communication plans
   c. Work sessions: on internal infrastructure, financial outlook, with staff to review aspirations, and with leadership on roles and expectations
4. Coaching sessions for new executive director
   *See handout
Incoming Executive Director Process

- Successor ED officially named
  - February 2018 board meeting
- Communications campaign to inform all partners
  - Late March and April 2018
- New ED signed offer letter
  - June 25, 2018
- New ED formally starts
  - July 1, 2018
Things Done Well

- **Collecting Wisdom**
  - SOS Institute
  - Talking to others who have recently led transitions

- **Outside Facilitation**
  - Consultant to manage succession plan logistics, including: communications plans, board support/training, coaching for incoming ED, staff support, executive team retreats

- **Overlap** – time to learn the details of the organization
Things that Could Have Been Done Better

- Less overlap in our time
- More planning for day one and beyond
- Board involvement
- Interview/process for selection of ED
- Support for outgoing ED
What made me feel ready for this position

➤ Ongoing leadership development opportunities

▪ SOS Institute

▪ Ignite Fellowship – NYU Wagner (Fellowship for Women of Color in Social Sector)

▪ Community Resource Exchange Leadership Caucus

▪ Leadership roles that built capacity
  ▪ Program Director at small nonprofit
  ▪ ED at Family Justice Center
Learnings First Year as Executive Director

- It was messy (even though we had a plan).
- Checklist schmecklist.
- Nobody is ready for the change, even if everybody says they’re excited about it.
- The difference between ego and confidence.
- How to rely on a team.

*I know everything. No, I know nothing. OK, I know a lot - but nowhere close to everything – and I’m going to be learning until its time to plan for the next transition.*
Chat

Questions?
Departure-Defined Succession Planning: Components of a Strong Plan

A. Organizational assessment, engaging staff, board and stakeholders

- Revisit mission, vision, core values, and direction of the organization.
- Assess the focus of the mission and impact of services.
- Ensure there is a strategic plan that includes leadership and talent development.
- Practice regular board and executive director evaluation.
Components of a Strong Transition Plan (2)

B. Build and strengthen the organizational capacity and sustainability

- Cultivate leadership at different levels, staff and board
- Reinforce infrastructure, including policies and legal procedures
- Ensure systems, financial reports, and reserves are in place
- Solidify team culture, especially around decision making
- Share external relationships with internal leadership staff, including funders, donors, and community leaders
Components of a Strong Transition (3)

C. Transition hire – interim executive director, especially if organization is in flux beyond leadership

D. Recruit and hire a new executive or leadership staff

E. Communicate the transition to staff, key partners and stakeholders
Succession Plan Outline (1)

1. The departing executive director/leader can support the transition.
   - Continue to lead the organization and prepare the organization for new leadership.
   - Agree on emeritus role for ED, if possible and necessary

2. Update job description/expectations to match organization needs
   - Competencies and skills: management, strategic thinking, board oversight, staff management
   - Experience and capacity
   - Leadership style (also style not desired)
Succession Plan Outline (2)

3. Form a succession planning committee

- Map out full executive search strategy
- Create and implement the successor development plan

4. Define internal/external communication plan

- Staff, funders, government, major donors, civic leaders, and the community
- Rationale for change, steps to achieve success, and plan for future
Succession Plan Outline (3)

5. Conduct a sustainability audit/organizational assessment.
   ✓ Explore effectiveness, financial position, community engagement, board, leadership, and staff effectiveness
   ✓ Gather input from departing ED, board, key staff, funders, others…

   ✓ Written goals and expectations of the successor, 90 days to one year
   ✓ Participation in formal orientation, meeting with board, staff, funders
   ✓ Support with resources, training, coaching, community connections
Possible Roles in Succession Planning (1)

Board of Directors (hiring is main function!)

- Define 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 infrastructure to attract new leader and set for success
- Organize outreach, assessment, and orientation of the new ED
- Support with onboarding new ED – onboarding is part of the hire!
Possible Roles in Succession Planning (2)

Departing ED/Leader
- Overlap
- “Senior advisor,” sounding board to the new leaders, as necessary
- Connection with contacts and introduce to funders

Staff
- Senior staff - part of transition committee & take greater responsibilities
  - Support for incoming ED/leader
- Gather staff input about transition & ideal new leader qualities
- Assessment of organizational strengths
Strategic Leadership and Equity

- Annual and periodic reviews of connection between mission, desired results, and an inventory of the leadership qualities needed for achieving these results.

- Cultivation of leadership and skills through training, mentoring, multiple job experiences, talent development, and nurture.

ARE THEY ALIGNED?
Strategic Leadership and Equity (cont’d)

- Identify leadership development opportunities for staff and board
- Identify critical positions in the organization
  - Establish a mentorship program/support, cross training
  - Staff development, work plans, performance reviews, supervision
- Reassign some responsibilities and tasks
  - Increased authority for program and budget decisions - gradual
  - Raise visibility as leaders, both internally and externally
What strategies have you used to develop the skills of staff, as well as potential successors?
Considerations Before Hiring a New ED

- Update job description
- Salary changes
- What will attract prospective leaders.
- Internal promotion?
- Expectations are clear for the new executive's first 90 and 180 days
- Anonymous staff and board survey about key leadership qualities
- Key criteria for vetting candidates and interview questions
Final Tips for Leadership Transition

- Gain the **commitment** of board and staff to manage transition intentionally.
- Draft a **timeline** for leadership successions that are planned.
- **Cross-train** current staff to minimize the disruption from unexpected changes.
- Succession planning for ED, key leaders, board chair – all are important
Reflecting on what you heard, do you have questions or comments for our presenters?

Share one or two strategies that have been meaningful, or helpful in succession planning.

For next steps:
Think about three things that you could do to operationalize a leadership succession plan.

Please see attached handout with tool and resources.
Resources on Succession Planning

Please see attached handout with tool and resources.

- Ten Actions for a Successful Leadership Succession & Resources (FUTURES)
- Succession Planning Within Domestic Violence and Sexual Assault Organizations (FUTURES webinar and resources)
- Building Leaderful Organizations: Succession Planning for Nonprofits Casey Foundation
- Succession Planning Toolkit for Nonprofit Sexual Assault and Domestic Violence Organizations (Resource Sharing Project)
- The Succession Planning Lens: Looking to the Future of Domestic Violence Organizations
THANK YOU!

Please take a moment to take a short evaluation regarding today’s webinar, and submit any questions. LINK

The recording of the webinar will be posted on the FUTURES website in the next few days:

For questions or additional information, please contact Mónica Arenas: marenas@futureswithoutviolence.org