



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

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Credit & Disclaimer

2

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Presenters

3



Janeen Gingrich

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

4

- 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?

5

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



Poll #2

6

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?

7

“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

8

Violence Intervention Program, Inc. New York

- ❖ 35 Years as an organization
- ❖ 60+ Staff members/employees



Outgoing Executive Director Experience Process

9

- 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

10

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

11

- 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

12

➤ **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

13

- 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

14

- 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

15

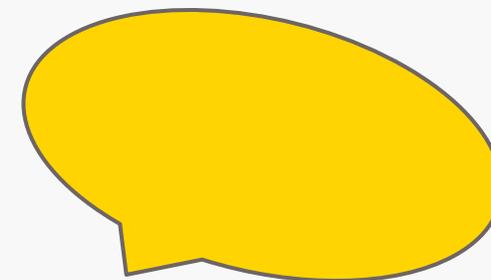
- It was messy (even though we had a plan).
- Checklist schmecklist.
- Nobody is ready for the change, even if everybody says they're excited about it.
- The difference between ego and confidence.
- How to rely on a team.

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

16



Questions?



Departure-Defined Succession Planning: Components of a Strong Plan

17

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)

18

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)

19

- 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)

20

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)

21

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)

22

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...

6. Promote successful transition of new executive/leader.

- ✓ 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)

23

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)

24

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

25

- ✓ 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?



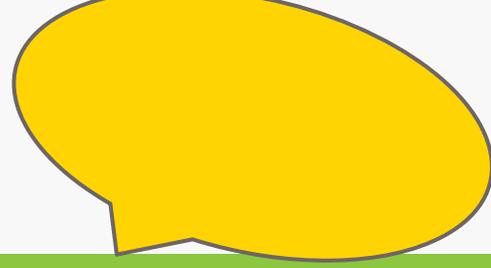
Strategic Leadership and Equity (cont'd)

26

- ❑ 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



Chat Question



27

What strategies have you used to develop the skills of staff, as well as potential successors?



Considerations Before Hiring a New ED

28

- 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

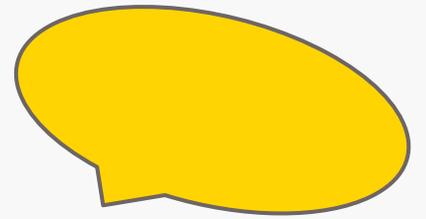
Final Tips for Leadership Transition

29

- 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



Group Chat & Question



30

- ❖ 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

31

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](#)



Succession Planning within DV and SA Organizations

32

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

