



SUCCESSION PLANNING WITHIN DOMESTIC VIOLENCE AND SEXUAL ASSAULT ORGANIZATIONS

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Credit & Disclaimer

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Presenter

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JANEEN B. GINGRICH, MSW

Janeen has worked for non-profit organizations for the past 22+ years, with her focus for the last 8 years being on capacity building, leadership development, and change management. She started out working at a DV/SA shelter in Southwest Virginia in the 1990s (Women's Resource Center in Radford, VA). Janeen is a champion of strength-based coaching, creating connections between organizations and people, addressing issues around equity and inclusion, and organizational development. She has also built non-profit development/fundraising programs from the ground up for a range of organizations, with budgets from \$250,000 to \$20M annually. She has worked at or volunteered for a total of five DV/SA organizations, including the statewide coalition in North Carolina (NCCADV), where she was most recently the Director of Programming. Janeen is the principal consultant at [Marquis-Duggan Non-Profit Solutions](#), which she founded in 2008 and named in honor of her mother and grandmother.



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

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- Define and discuss the importance of succession planning.
- Identify key elements of a strategic and emergency succession plan and important considerations in the planning process, such as inclusion and equity.
- Engage staff (key managers and executive directors) in succession planning.



Poll 1: What is your role at your organization?

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



Poll 2

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How many of your organizations have succession plans?

Yes

No

Don't Know



What is succession planning?

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“The thoughtful and organized planning for transitions in key leadership positions (e.g., Executive Director, Director of Finance, Board President, etc.) for an organization.”

Support for the departing person, the incoming person, and the staff – GOAL!



Chat Question 1

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Why is succession planning important?



Why is succession planning important?

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- HR best practice
- Increases sustainability and stability
- Builds new leadership
- Less likely to lose donors, board members, and supporters
- Staff retention
- Creates a culture of support and models leadership development



Chat Question 2

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What are the different types of succession plans you should have?



Emergency Verses Long-Term Succession Planning

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- Often referred to a “hit by the bus plan” – prefer to call it “winning the lottery.”
- An emergency plan should exist, particularly important for EDs to ensure they have all information, like passwords, account numbers, etc. for finance, office manager, and program directors.
- A non-emergency succession plan should exist to increase long-term stability and sustainability.



3 Types of Succession Plans

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- Crisis Succession Planning
- Departure-Defined Transition Planning
- Strategic Succession Planning



Crisis Succession or Back-up Plan

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- Ensures that key leadership and administrative functions, as well as agency services, can continue without disruption in the event of an unplanned, temporary absence of an administrator.
 - Clarify position's key responsibilities.
 - Develop a cross-training plan for the identified back-ups that ensures they develop their abilities.
 - Draft a plan and work with or present to the board to review and adoption.



Departure-Defined Transition Planning

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- The board, executive director, and management staff can develop and utilize an action plan when leadership staff begins thinking about leaving the organization.

Focus:

- Communicating the transition to staff, key partners and stakeholders,
- Conducting an organizational assessment,
- Building organizational capacity and sustainability,
- Recruiting and hiring a new executive or leadership staff , and
- Celebrating the transition.



Strategic Succession Planning

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- Connects to strategic plan, long term vision, and creates organizational sustainability and stability, including recruiting and maintaining talented individuals who have or who can develop skills.



Elements of a Succession Plan

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- A systemic plan that builds internal capacity
 - Not just a list
 - Not just some ideas or passwords
 - Takes into account strategic plan and vision for the organization



Elements of a strong succession plan (2)

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- Have the up-to-date job description for ED
- Develop a document that outlines the skills and attributes necessary for success
- Get staff buy-in up front
- Share existing relationships



Poll 3: Who should be involved in the planning?

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Typically, the following people are involved in succession planning:

- All staff
- Board
- CEO
- ED
- Volunteers



Who Should be involved?

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- Staff, Board, and CEO, even volunteers.
- Include all levels of staff-they can assist in documenting critical information, history, and processes that are essential for incoming staff/board.
 - Integrate into onboarding and evaluation
 - Enhances equity
 - Be honest with yourself about diversity
 - Ask who has demonstrated ability/desire to do more



Information to Gather:

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- ✓ Organization's mission statement, history, core values, and philosophy statements;
- ✓ Organizational chart;
- ✓ Job description for each staff position and sample work plans of key responsibilities;
- ✓ Checklists of key resources, grant information (i.e. deliverables, etc.) for each staff positions;
- ✓ Passwords for each staff person (e-mail, grant website/portals...)

Information to Gather: (2)

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- ✓ Program or grant reports and due dates/deadlines;
- ✓ Key contact or relationships with partners, funders, etc., for each staff position;
- ✓ Training plans for staff development or specific job orientation processes;
- ✓ Procedures for client service plans, specifically for terminating or transitioning a client to another staff person.



Ten Planning Tips for Leadership Transition

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1. Gain the commitment of board and staff to manage transition intentionally.
2. Identify current and future challenges and the corresponding leadership qualities that are needed to navigate the challenges successfully.
3. Consider placing an interim leader.
4. Draft a timeline for leadership successions that are planned.



Ten Planning Tips for Leadership Transition (2)

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5. Adopt an **Emergency Leadership Transition Plan** to address the timely delegation of duties and authority whenever there is an unexpected transition or interruption in key leadership.
6. Identify **leadership development opportunities** for staff and board members to expand their leadership skills so that the organization will have a “deeper bench” of future leaders.
7. **Cross-train** current staff to minimize the disruption from unexpected staffing changes.



Ten Planning Tips for Leadership Transition (3)

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8. Make plans to adequately **support** newly-placed employees, such as with coaching, mentoring, and defining goals.
9. **Communicate:** What will your organization say to stakeholders before, during, and after a transition of leadership? Thoughtful communications are needed in order to support the staff and organization during the transition process.
10. **On board deliberately:** Help new board chairs and chief staff leaders feel confident and find their voices.



Resources on Succession Planning

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- ❖ [Building Leaderful Organizations: Succession Planning for Nonprofits](#) Casey Foundation
- ❖ [Emergency Succession Plan Template](#)
- ❖ [Succession Planning Toolkit for Nonprofit Sexual Assault and Domestic Violence Organizations](#) (Resource Sharing Project)
- ❖ [Succession Readiness Checklist](#)
- ❖ [Succession Planning for Nonprofits of All Sizes](#), Blue Avocado
- ❖ [The Succession Planning Lens: Looking to the Future of Domestic Violence Organizations](#)
- ❖ [What HR Managers Need to Know About Succession Planning](#), the Balance



Succession Planning within DV and SA Organizations

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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 Monica Arenas: marenas@futureswithoutviolence.org



Upcoming Webinars

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Save the Date!

- ❖ Providing Support Through Organizational Transitions
September 20, 2018, 11:00 a.m. Pacific
- ❖ Workplace Policies for a Healthy and Efficient Organizational Culture
September 25, 2018, 11:00 a.m. Pacific

