

# Transitions: Taking the Long View Responsive and Responsible Succession Planning

Leaders Assembly  
Foundation for Jewish Camp  
March 6, 2016

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# TRUE OR FALSE

- Good succession planning takes 2-3 years
- 50% of executive directors hired following a founder leave within two years
- Organizations have a realistic sense of the time, effort, and \$\$ required to attract and retain the next leader
- 61-78% of non-profit executive director positions are expected to turn over in the next five years

# THE FUTURE IS NEAR

- Anticipating the “Silver Tsunami”
- Tapping into the wisdom and experience of our elders
- Planning for a “Leader-full Future”

# FRAMING QUESTIONS

- What elements of “good management” also support good transitions?
- What makes it hard for founder driven organizations to transition to new leadership?
- How can funders, board members, staff, and executive directors support succession planning and transition management?

# TAKING THE LONG VIEW

- 2-3 year time horizon, more for a founder or long-term leader
- View it as an organizational function, not an episode

# Best Practices in Succession Planning

- Move from leader driven to stakeholder driven
- Create leadership pipelines
- Craft an emergency succession plan
- Build leadership capacity throughout the organization – staff and board
- Recruit a strong #2
- Set term limits for the board and intentionally build board leadership
- Move from leader-centric to shared leadership/distributive leadership model
- Codify vision and core values
- Articulate contingency plans
- Practice – sabbaticals, leaves of absence
- Formal job descriptions and regular performance reviews

# Who Transitions?

## Leadership AND Organization

*Transitions are also likely to be times of organizational change, culture shift, and re-structuring.*

# Transition Type

- Sustaining Success
- Turnaround
- Under-Performing
- Emergency
- Founder/Long-Term Leader Departure
- Start-up (hire first Executive)



# Risk Factors for Founder's Syndrome

- The board is comprised exclusively of close friends and colleagues of the founder.
- Staff see themselves as working for the founder, not the organization.
- The board defers to the founder on most major decisions.
- The board does not raise issues it feels the founder might be uncomfortable with.
- The organization is averse to systemized planning.
- There are no accountability structures. The Executive Director does not have a regular performance review or clear deliverables.
- The founder is seen as the driving force in the organization.
- Everyone silently fears the departure of the founder.
- Donors seem more attracted to the founder than they are to the cause.
- Staff do not feel that they can voice dissent or ideas that would be unpopular with the founder.
- The board cheerleads but it does not lead.
- When there is a crisis, stakeholders look to the founder for answers.

# Best Practices in Transition Management

- Know your organizational moment
- Good process goes beyond “find and replace”
- Strategic thinking before and after – includes sustainability planning
- Determine roles for founder/exiting ED – hands on, on-call, hands-off – set boundaries, monitor
- Don’t hire “in opposition”
- Manage internal candidates carefully
- Consider an interim
- Have a plan for the lame duck period
- Culture and values fit are as important as other criteria
- Transition includes successful on-boarding of new ED – support, access, good will

# Prepare, Search, Thrive

- 1) Assessment
- 2) Education (stakeholders, funders, partners)
- (3) Interim ? )
- 4) Search
- 5) Out-board (knowledge transfer, next role, compensation, boundaries)
- 6) On-Board
- 7) Support
- 8) Assess

# When do interim's make sense?

- Leave of absence (anticipated, emergency)
- Quick departure
- Turnaround
- Organizational decline
- Dominant leader transition
- Dissolution

# Transition/Succession Committee

- Board Committee helps to steer process prior, during, and post-transition
- Should include current Chair and Rising Chair

# What does success look like?

- New executive is able to meet current and future needs
- Right fit for organization's values and culture
- Meets and exceeds expectations (goals, benchmarks)
- Remains in position three years or more