

# SUCCESSION PLANNING for NON-PROFITS

## 10 Tips for Managing Successful Transitions



Succession planning is a long game. Whether you are dealing with a *planned or unplanned* departure of a key staff person or board member, there are steps every organization can and should take to be prepared to fill a vacancy and to manage transition. This is part of good risk management, and part of running your organization smoothly.

- 1. Documentation** – get everything in writing, and stored centrally in a place where it can be accessed easily. This will mean that critical information is not lost, missing or inaccessible. This should include job descriptions (board and staff), access codes, policies, agreements with partners, insurance policies, and historical data. Ideally this should be stored safely online, with off-site back-ups. If there is information that exists only in the heads of your long-time board members or staff, NOW is the time to get it written down! If you don't yet have a generic email address for the organization, set one up. Email addresses tied to individuals will be of no use when they leave, and the historical information in an organizational email file can be very useful.
- 2. Annual Calendar** – having a chart or list of what typically happens in a year will make sure that important deadlines don't get missed, and planning is not last minute. Even if nobody is leaving, this is a good tool to have for everyone's benefit.
- 3. Sharing the Load** – when there are many people (or even at least 2) capable of performing each task, then there is always back-up should something unexpected happen. Explore opportunities for mentoring, partnering, and shadowing to build depth on the team. People can take on *parts* of a job without committing to the whole thing, so they can start practicing some of the skills they may need. For example, have someone other than the secretary take minutes at a board meeting occasionally, or have the vice-president prepare an agenda and chair a meeting every once in a while.
- 4. Long-term commitment** – encourage people (board members and staff) to commit for at least 2 to 3 years, so that they have time to absorb the organization's culture and learn the routines. Some groups elect the whole board every year for a one year term.

This should be changed to longer terms and staggered terms, so that each year some people are automatically returning to complete their term.

5. **Identify potential candidates early** – if someone is invited to consider replacing the chair or treasurer early in their term, they will have time to learn what is involved, and start practicing some of the tasks. If there are two or three possible replacements for a staff person, they could each take on a small assignment and see how it goes, ideally well before the staff person leaves. If there is no one on your team right now who is interested or qualified, then it is time to widen the net and search farther afield.
6. **Consider official job-sharing** – explore options for co-chairing, or “deputy” officers, or assistants, so that people can assume some responsibility in a role prior to the departure of the incumbent. They can “test-drive” the job while being supported.
7. **Choose a departure date** – where possible, someone planning to leave should give as much notice as possible, and commit to a specific date. (The AGM is a good opportunity to pass the torch for board members, rather than mid-term.) If the date is announced and shared it makes it real. Start handing stuff off sooner rather than later.
8. **Plan a transition period** – It doesn’t have to be “all or nothing”. A board member could retire from serving on the board, but continue to be involved with training volunteers or serving on the Events Committee. A retiring staff person could reduce to half-time for a set period and then step down full-time. An official transition period can help reduce stress for everyone. Some groups have the president stay on the board for a year after they step down as president in an official “Past-president” role.
9. **Celebrate the change** – where possible, celebrate the fact that succession is happening. Thank you cards and/or gifts, retirement parties, memory books, memorial scholarships, and so on all celebrate the fact that change is normal, and help create a culture that embraces evolution within the organization.
10. **Evaluate and continue** – succession planning is a continuous, ongoing process. When someone leaves and is replaced, look back at how it went and fine tune the process for next time.

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