

# Prepare to Thrive: How attention to executive transition and leader succession guarantees more mission results

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# Organizations with effective and on-going leadership make a bigger difference



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Equity is a core value



Leadership Continuity



Executive Transition



Mission Results

# Exploring our Premise: Does Leadership Matter?

## Illuminating Stories Mingle 2

Think about organizations you know. Without mentioning the organization, tell a neighbor about the following:

- ▶ Have you seen how an executive transition was handled strengthen or weaken an organization? What happened?
- ▶ Have you seen organizations plan ahead for future leadership needs? What happened?
- ▶ Have you seen organizations caught not ready for leader change? What happened?

Listen for two minutes and share for two minutes. You will have five minutes for your discussion.

Report out stories you think bear repeating.

# Practice 1: Attention to Executive Transition

Executive transition = from announcement of departure to successful onboarding of new executive



## Key assumptions:

Leadership transition is both art and science.

Transition is inevitable and unavoidable.

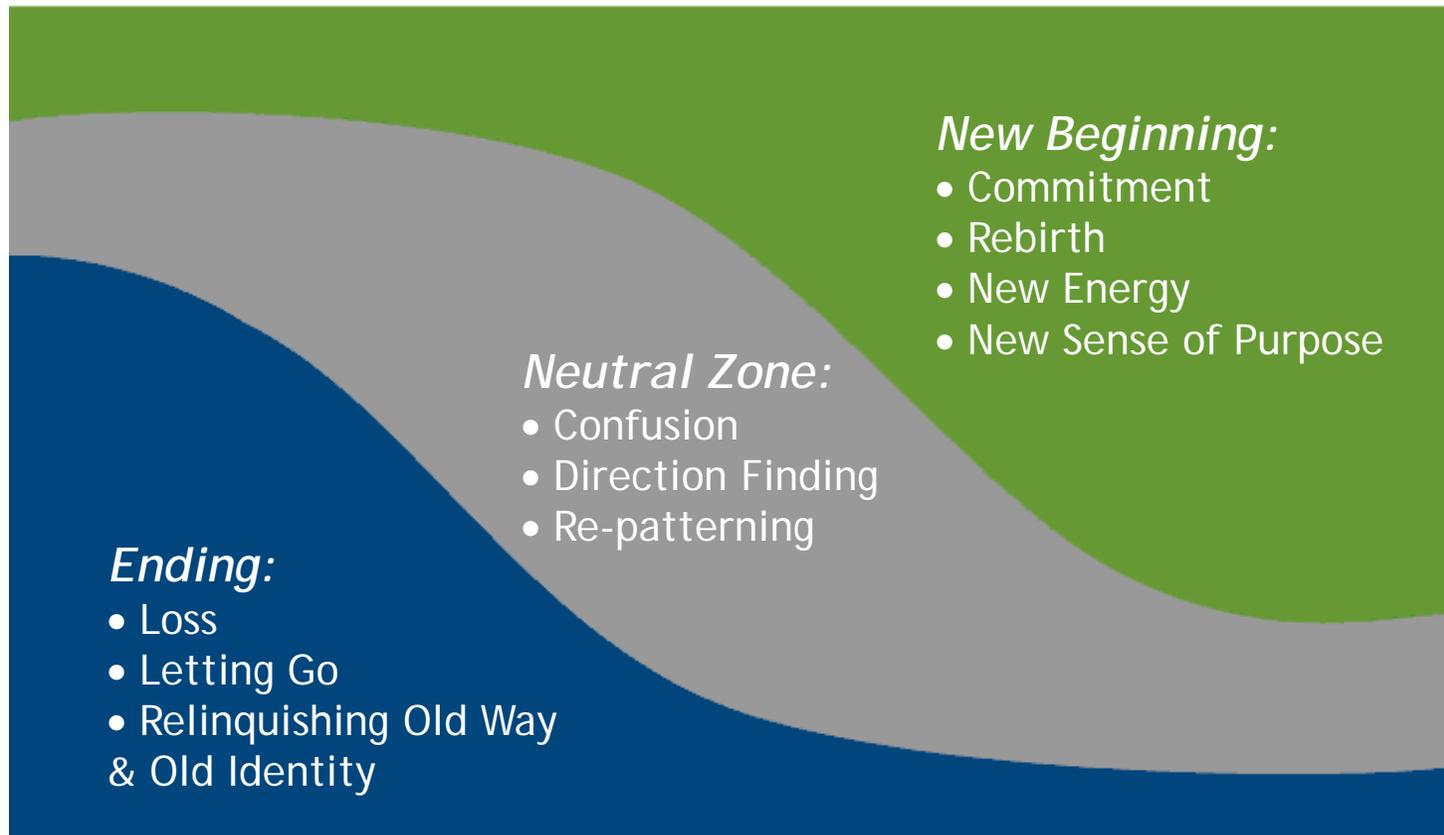
Attention to emotions is important.

No perfect moment for transition.

The Board is in the lead and steps up during transition

# TRANSITION

## *Coming to Terms with Change*



Source: Bridges, William. *Managing Transitions: Making the Most of Change* 2<sup>nd</sup> ed. Cambridge, MA: Perseus Pub., 2003.



# Practice 2: Succession Planning & Leader Development



## Succession Essentials - Succession Policy and Emergency Backup Plan



## Leader Continuity Planning and Leader Development

- Exploring beliefs and leader culture
- Assessing and building bench strength
  - Advancing diversity, equity and inclusion



## Departure-Defined Planning

Founder/long-tenured  
executive departures  
Planning & executing internal  
succession

# Connecting Sustainability with two recommended practices: Succession Planning and Executive Transition



# Ways to get started



A Board conversation with your executive to locate yourself in terms of potential transition and bench strength?



Consider current practices and approaches to advancing diversity and equity



If executive transition is expected within next year, begin with Tebbe Six Tasks and decide what resources you have and what help you need



If no executive transition is imminent, begin work on:

Develop or review emergency backup plans, succession policy, and leader development practices

Decide on next actions to advance diversity and equity

Plan a bench strength review and discussion with the board to look at leadership continuity for board and staff

Other actions to advance leader development culture and leader continuity planning

# Resources

- ▶ Chief Executive Transitions: How to Hire and Support a nonprofit CEO, Don Tebbe, Board Source
- ▶ Leading for Mission Results: Connecting Leadership Beliefs with Predictable Changes, Tom Adams & Jeanne Bell, reprinted March 2109 *from the Nonprofit Quarterly's winter 2017 edition, "Advancing Critical Conversations: How to Get There from Here."* It was first published online on January 23, 2018.
- ▶ Focus on Sustainability: A Nonprofit's Journey, Dennis G. McMillian, The Foraker Group
- ▶ Awake to Woke to Work: Building a Race Equity Culture, Equity in the Center, A Project of ProInspire
- ▶ The Nonprofit Leadership Transition and Development Guide, Tom Adams
- ▶ Annie E. Casey Foundation Monograph series [www.aecf.org](http://www.aecf.org)

# Discussion and questions

- ▶ What's clear and compelling?
- ▶ What's unclear and needs more discussion?
- ▶ What's unclear and needs time to settle?
- ▶ Other questions? Comments?
- ▶ What is possible next action for you and your organization?