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 to 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

New Beginning:
- Commitment
- Rebirth
- New Energy
- New Sense of Purpose

Neutral Zone:
- Confusion
- Direction Finding
- Re-patterning

Ending:
- Loss
- Letting Go
- Relinquishing Old Way
  & Old Identity

**PREPARE**

**SEARCH & SELECT**

**ONBOARD & SUPPORT**

**TASK 1**
Understand & Guide the Transition

**TASK 2**
Prepare for a Leadership Change

**TASK 3**
Ensure Leadership Continuity

**TASK 4**
Manage Communications & Ensure Positive Closure

**TASK 5**
Search for, Select & Hire the Chief Executive

**TASK 6**
Onboard & Support the New CEO

- Several weeks to months
- 4 to 6 months or more
- First 90-100 days & ongoing

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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

Executive Transition

Leadership Capacity Building

Emergency Succession Planning

Organizational Sustainability

Mission Sustainability
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
- 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
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?