

Succession Planning for [NOT] the CEO



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CEO succession planning arises as a strategic risk and key concern of nonprofit boards in many NRM-led Risk Assessments. If you're looking for an article about CEO succession planning, this is not it. Instead, review our popular article, [Avoid Transition Trauma with a Succession Plan](#).

This article explores succession planning for nonprofit leaders other than the CEO. Eureka moments often occur during our consulting engagements when nonprofit teams realize the CEO is one of many individuals whose departure could cause 'transition trauma.' Read on for inspiration for establishing a non-CEO succession planning process.

Why Succession Planning is NOT Defining a Successor

While many organizations practice the literal form of succession planning—defining a successor or #2 person waiting in the wings—the NRM team does not support this approach. This approach is problematic as many nonprofits are too small to have an internal pool of potential C-suite leaders or backups for any key positions. Plus, any nonprofit leader would be woefully naïve to believe that a talented, C-suite material staffer would wait around for her chance to take up the mantle as a key player on the team. And if your designated #2 departs for any reason, then the succession plan is suddenly kaput.

Instead of defining actual successors for any key leadership roles, we believe that succession planning should be about the planning process and having an actual plan in place to help your organization effectively manage inevitable staff transitions. Using CEO succession planning as an example, the board is charged with establishing a succession plan that it will implement when the existing CEO is suddenly unavailable or announces her plan to leave. The succession plan should provide instructions—originally developed and approved by the board itself—that the board will now follow to conduct activities including: determining any shifting needs the nonprofit has for its incoming CEO, revamping and advertising the CEO job, filling the role temporarily with an internal or external candidate, vetting CEO candidates, hiring the selected candidate, and managing the transition and onboarding of the incoming CEO when the time is right.

Now that we've cleared up what succession planning is and isn't, how can we apply this critical process to non-CEO roles?

All Aboard the Succession Planning Train

The aforementioned article, [Avoid Transition Trauma with a Succession Plan](#), describes three preliminary steps to complete before beginning the succession planning process for any role. Conducting these three activities regularly will create a climate for effective succession planning at your nonprofit.

Adopt and follow a performance review process for key leadership roles to empower your nonprofit team to continually assess and reshape leadership roles as the needs and priorities of the organization change over time.

Keep position descriptions up-to-date for all key positions to ensure that day-to-day duties and overarching goals are fully understood, and are kept in an accurate, written record.

Offer cross training and clarify back-up personnel for key activities completed by your team members to prepare your team for temporary succession solutions (e.g., in the event of an unplanned departure in which department staff must take on a department head's duties).

If you're confident that the activities above are occurring at your organization, then you've laid the groundwork for managing leadership transitions. Now it's time to adopt an approach to succession planning.

Depending on the size, complexity, and culture of your organization, your approach to non-CEO succession planning could be either formal or informal for certain roles. Generally speaking, succession planning for non-CEO roles will be far less formal than CEO succession planning, since there is no need to engage the board in planning for leadership transitions of other key staff.

The NRMC team often recommends a collaborative succession planning approach, allowing the relevant departmental or functional teams to participate in the search and hiring process for their own staff colleagues and even department heads. Team-based hiring enables you to seek and select new hires based on the perspectives of your diverse team members, and team-based hiring also encourages the recruitment of new staff leaders who are truly welcomed and approved by many of their soon-to-be peers and direct reports. These benefits can cultivate feelings of positivity and ownership among staff while reducing stress associated with leadership transitions.

If your HR team typically takes the lead on employee recruitment, then consider involving both HR and the department with open roles. Breaking down these silos will produce myriad benefits including gratification for HR staff whose employment practices expertise might be overshadowed by the work of programmatic staff, and an appropriate division of labor between HR and the initiating department, which promises to ease common recruitment pains that occur when these functions are out of sync (e.g., unrealistic expectations for personnel budgets and hiring/screening timelines, inaccurate position descriptions, ineffective onboarding that is either too general or is too role-specific, etc.).

If an executive staff member is leaving your organization—whether planned or unplanned departure—we recommend that one or more leadership team members (e.g., other department heads, other C-suite leaders, etc.) collaborate with the departmental team of the departing executive (with the exiting executive participating if possible). A similar approach could be used when planning the transition of any staff member within a specific department. A leadership representative and the department team can collaborate to facilitate informal, candid team discussions about the nonprofit's near future and shifting personnel priorities, using questions like:

- Is the staff member's position description up-to-date? Are there other critical responsibilities or personal qualities that the individual brought to our team, that are NOT listed in the position description? (If the answer is 'yes,' be sure to update the position description.)
- What elements of the role should remain the same in the distant future? What elements need to change based on our internal and external environments and any opportunities or challenges that lie on our organization's horizon?
- Are there any special considerations for the role based on other personnel gaps that exist within our department? Are there any other personnel gaps in our department that could potentially be filled or be partly filled by a single new hire? How might this type of role be structured or developed?
- As we begin the search process, how will we support the departing staff member's role in the interim?

What are the critical responsibilities that should be delegated to other members of our team for the time being?

- Will the departing staff member personally be available to help onboard the new hire? If not, how will we capture and share the institutional knowledge needed to provide the new hire with a solid foundation during onboarding? If so, how can we ensure a positive and productive experience for both the exiting and incoming individuals?
- As we identify candidates for the role, how do we foresee this transition occurring? What can we do now to ensure that a smooth, positive transition occurs? Are there any gaps we need to address in our screening/hiring processes or our onboarding/training programs?

Whether it's your first foray into non-CEO succession planning, or you're a succession planning veteran just looking to revitalize your approach, your best bet is to rely on the intimate knowledge your own peers have of your organization. Leverage your team to cross-train each other and volunteer as backups, to manage staff transitions, and to seek out new colleagues who truly embody the spirit of your mission.

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