

Leadership Succession Planning

“Expect the unexpected” is a good slogan for leadership succession planning. Leadership change will happen, but it doesn’t have to cause total chaos.

Leadership succession is another component of strategic planning. If you haven’t put a plan in place, now is the time. Previous issues of A.R.T.S. at www.arts.ok.gov/Pages/news/pubartsback.html can be of help to you.

Let’s look first at the board of directors. If your board is like most, there is constant change—terms expire, the amount of free time to devote diminishes, people move, etc.

Then there’s the founder of a nonprofit organization. If the founder is still involved in its operation, bringing up the question of succession could be delicate, but it needs to be done. Anyone who has achieved their vision should want to preserve it and should be willing to share his/her wishes for the future. Honest dialog between the board and the founder can establish direction.

Having to fill the chief executive or managing director position for any reason—planned, unplanned, or other—will create unrest within the staff and concern as to management direction. The immediate problem is how a replacement will get the training and experience necessary to carry out the duties of this position.

Now, what if your artistic director left? Would the organization’s whole creative direction change? A successor will naturally see things differently.

Finally, there are key employees. Maybe they have worked there for years. Besides all the history and valuable information they possess, what about the work they do? Who would have the necessary skills to step into their position in an emergency?

The following outline should provide a process that can be used for replacing leaders from board members to staff. Not all steps will, of course, be applicable in all situations.

Plan for succession

Regular strategic planning should address the future as the board and staff see it and should include a section on organizational growth and future staffing needs. It should be reviewed annually. Job descriptions (including those for board members) should be up-to-date, consistent with what is actually being done, and also reflect the future. Performance assessments should be completed annually in all areas.

Create depth

Boards might want to be proactive about the type of people needed in their ranks to achieve their goals and might want to consider creating a board development committee that identifies new members year-round and grooms future leaders from current members. They could also determine if diversity or younger members are needed.

Encourage board and staff members to discuss their personal and professional goals but always be prepared for changes by securing and developing knowledgeable and skilled leaders for your team and having them work closely in order to cross-train so they'll be ready to step into another position, if necessary.

Implement the plan

When a change does occur, review the strategic plan and job description—think of current operations, community needs, and the future. View change as an opportunity to reassess and shape the organization. Review organizational challenges as to whether they call for strengths that may not have been identified such as technology, marketing, financial or development expertise or, in other words, a different needed set of skills. Determine candidate qualifications.

Form a search committee

The committee is usually made up of board members with possible staff representatives. Be realistic about the number of people on the committee, timelines, expectations, roles and the amount of time that will be involved. Communication is vital and the search committee can be a stabilizing factor by keeping everyone informed.

Begin your search

The search can be extensive or there may be an obvious choice such as an internal candidate. A consultant, recruiter, or search firm can offer professional expertise as well as access to pools of candidates. Otherwise, consider as wide a search as possible without being overwhelming, get the word out

to stakeholders who may help identify qualified candidates, and publicize with service organizations in the field. The person who currently has the position and other staff members can not only be helpful, but they'll appreciate being included. It is wise to keep all stakeholders regularly informed so they see that a thoughtful transition is in process to help alleviate anxieties and misperceptions.

Interview Candidates

Interview the most promising candidates. Compare and analyze them. Then assess their "fit" with your organization, staff, and community. Keep an open mind. Thoroughly check references, former employers and with others in the field. Make the decision or take two or three finalists to the board for a decision. Offer the candidate the position.

Make the transition

Assuming acceptance, an announcement is made. Be patient, provide support and needed guidance during the initial orientation period. Allow some adjustment time before heaping on all duties and responsibilities. Keep communication open.

There may be a great deal of emotion attached to the person leaving your organization. Honor their achievements, make them feel appreciated, and give them the support they need.

Leadership succession is important to the life of the organization and how it is handled reflects on the board, staff and the organization itself. Ultimately, however, the board must live with any leadership decision. For that reason, it is in their best interest to be as sufficiently involved as necessary to make sure the right decisions are made.

Resources

Board Recruitment & Orientation by Hildy Gottlieb, call 520.321.4433 or www.help4nonprofits.com/BoardRecruitingBook.htm

Founder's Syndrome: How Corporations Suffer - and Can Recover (for nonprofit or for-profit organizations) by Carter McNamara, www.managementhelp.org/misc/founders.htm

Planning for Succession: A Toolkit for Board Members & Staff of Nonprofit Arts Organizations by Merianne Liteman, www.artsalliance.org or 312.855.3105



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The Golden Foundation wishes to foster innovative artistic expression and the creative process by supporting cultural organizations that directly support visual artists working in paint.

Deadline: October 1, 2004

Information: Call 607.847.8158 or www.goldenfoundation.org/application2.htm

Mid-America Arts Alliance has funding available for presenters to support performances by artists from Mexico.

Deadline: Open—first come, first served

Information: Call 816.421.1388, ext. 226 or see www.maaa.org/spec_proj/special.html

The National Endowment for the Arts

is establishing three NEA Arts Journalism Institutes that will focus on improving arts criticism in classical music, opera, theater and dance. See information at: www.arts.gov/news/news04/ArtsJournalism.html

The Getty Grant Program is awarding Curatorial Research Fellowships to support the professional scholarly development of curators by providing them with time off from regular museum duties to undertake short-term research or study projects that advance the understanding of art and its history.

Deadline: November 1, 2004

Information: www.getty.edu/grants/research/scholars/curatorial.html or 310.440.7374