



## Community Foundation for Greater Atlanta and BoardSource Partner to Give Nonprofits Essential Succession Planning Tools and Training

Succession plans do for nonprofits what wills or testaments do for us as individuals, they help us plan for our future. As a CEO, when you engage in succession planning, you're thinking ahead to everything your successor and others will need to know and do in order to carry on the good work your organization does after you're gone. As a board member, you're thoughtfully planning to ensure that the organization is able to stand the test of time under a new leader.

Succession planning remains the number one organizational concern expressed by nonprofit boards and CEOs according to Bridgespan's research stretching more than a decade. Despite succession planning holding this place, the Community Foundation for Greater Atlanta's 2014 research showed only 30% of nonprofits in the Atlanta region have succession plans in place. If succession planning is of such high concern, why is it not widespread?

Succession planning brings up a variety of emotions for those involved. CEOs might fear that bringing succession planning up implies they are ready to leave, or that engaging in the planning process too early might lead to powerlessness. Board members might fear they're sending a signal to their CEO that they are unhappy with his/her performance, or that external stakeholders including funders might take it as a sign that something is amiss in the organization. Regardless of the emotions and fear involved, it is important to put concerns on the table and to clarify for all involved that the organization's leaders are prioritizing the organization's future sustainability and the needs of the community it serves.

The Foundation's 2014 research also indicated that in order to engage in an effective succession planning process, nonprofit CEOs and board members need and want guidance from a trusted, experienced advisor. Workshops providing overviews or templates were not going to fully meet their needs.

In response, the Community Foundation partnered with BoardSource to design a program that would give a group of Atlanta-area nonprofits access to research-based instruction and individual guidance – someone in their corner guiding them along the way, holding them accountable and forcing them to answer the tough questions. Reflecting upon it now, we know our model was successful. We also learned a lot first-hand about what's keeping nonprofits from engaging in succession planning on an ongoing basis.

We titled the program “Embrace the Future: Succession Planning for Nonprofit Organizations” because we wanted participants and their organizations to view this as an opportunity to advance their work and continue their organizations’ journeys. Succession planning should be seen as a comprehensive and fundamentally essential process that allows the executive, board and staff to work collaboratively to ensure organizational sustainability.

At the onset we had a big audacious goal – for every nonprofit participating in this program to develop a Succession Plan Policy, an Emergency Succession Plan and a Departure-defined Succession Plan. We brought together a cohort of 15 nonprofit executives and board leaders for four face-to-face training sessions that were anchored by homework assignments designed to guide participants through prerequisite materials for succession planning. These sessions provided a rich environment and opportunity for the executive and board leader to engage in meaningful discussions, and for the cohort to network, share practices and work through concerns. The meaningfulness of individual organization and group discussions was consistently lauded, and executives and board members noted a significant deepening of trust, transparency and teamwork.

While we felt confident that the sessions and structured assignments were sufficient to heighten their understanding of the comprehensive elements of succession planning, we felt certain that the training format alone was insufficient for ensuring that each of the participating organizations completed their succession plans. Fortunately, we had the foresight to add what we now understand was the critical ingredient for success – access to the consultant for individual organizational coaching sessions.

Throughout this six-month program, the participating organizations successfully completed various organization and board evaluations, reviewed and updated performance management policies, enhanced staffing and clarified senior leadership expectations, and most importantly established a process for safe and open communications about transitions throughout the organization.

### **Outcomes**

As a result of participating in Embrace the Future, 100% of participating organizations accomplished the audacious goal we set out – all have a Succession Plan Policy, an Emergency Succession Plan and Departure-defined Succession Plan. Additionally, two thirds of participants reported developing relationships and networking with each other outside of the cohort program sessions. Participants achieved organizational strengthening through the impact of completing the required sustainability prerequisite assignments.

We also witnessed that the participating nonprofits experienced a renewed sense of urgency, energy and commitment toward future sustainability. They demonstrated heightened organizational pride and sense of accomplishment as they completed the various prerequisite operational and board tasks, and ultimately the succession plans. Two participating organizations shared the following:

*"We developed a great plan and process that includes attachments to policies that will provide important guidance in executive succession planning and implementation. We also agreed to create an HR Task Force of Board and staff during 2016 to facilitate development of a stronger internal successor development plan at multiple levels of the organization."*

*"We have some work to do--some tasks that have been long-identified but never prioritized. This experience has helped us sharpen our focus on tasks like operations manuals, enhanced use of technology and more functional cross-training. My board chair-elect and I enjoyed working together and I think the mutual appreciation will have value in lots of ways."*

Feedback indicates that for all who were involved in Embrace the Future, it was an amazing experience. Participating nonprofits confirmed our theory that succession planning is a critical sustainability factor for nonprofit organizations, for which responsibility rests with the Board of Directors. Nonprofit boards have to ensure the organization's readiness for leadership transition by recognizing that leadership transition is more than simply hiring the next executive – it's about ensuring the organization is truly prepared to embrace the future.

The Community Foundation is pleased to announce that it will offer Embrace the Future: Succession Planning for Nonprofit Organizations again in 2016. Details will be announced in the coming weeks on our [website](#).

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