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Liberation to Leadership: The Role of CILs in Transforming Communities

Succession Planning and Professional Leadership at CILs

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Succession Planning

- No leadership plan is complete without planning for an eventual change in leadership.
- A change of leadership is one of the most important and challenging opportunities a nonprofit board will face.

Succession Planning, cont'd.

- Some of us have worked in the field for a long time, but none of us will work forever.

Succession Planning, cont'd. 2

- A thoughtful transition allows an organization time to reflect before jumping into search mode for a new executive.
 - An opportunity to review the organization's strengths and challenges
 - Review the strategic plan and direction
 - Engage the board in leadership evaluation
 - Engage the staff in discussion regarding the organization's values, vision, and culture
 - Develop a transition team

Succession Planning, cont'd. 3

- This session will focus on replacing Executive Directors of CILs.
- However, CIL boards and management should also plan for smooth transitions among every employee, from Administrative Assistants and Service Providers to Finance Managers and Executive Directors.

Succession Planning, cont'd. 4

- To plan for replacing any staff position, two things are strongly recommended:
 1. Developing written procedures for ALL services (CILs usually have administrative policies and procedures, but not programmatic ones).
 2. Ensure at least two staff members know the basics of each service and the accompanying procedures (i.e., if you have a Housing Specialist, make sure one other IL staff member knows Housing).
Cross training of all core IL services amongst all service providers is a best practice.

Succession Planning, cont'd. 5

- For Executive Directors, there should be 2 plans:
 1. The first is for an unexpected departure.

Succession Planning, cont'd. 6

- The Board of Directors should have a plan for who will be the Interim Executive Director:
 - The Deputy Executive Director, if there is one
 - A board member – (usually not a good practice)
 - One or more management staff (program, development, finance, business, etc.)
 - An outside, temporary executive specialist or consultant

Succession Planning, cont'd. 7

- At least one other supervisor or manager should know where all information is kept and what procedures the Executive Director handles.
- Business and financial accounts and grant information, as well as user IDs and passwords, should be kept in a secure, yet accessible place for a manager and/or board chair to access.
- More than one person should be a signatory on accounts, even if it's only the board chair or treasurer, along with the ED.

Succession Planning, cont'd. 8

2. The second plan is if the Executive Director gives some notice (hopefully at least 3 to 5 months).

Succession Planning, cont'd. 9

- The succession plan should include:
 - Who will make up the ED search committee (board only? staff & board? staff, board, and community?)
 - Who will decide on the salary/benefit package and job description?
 - Where will job announcements will be posted (nationally, statewide, locally)?
 - What procedure will be used for reviewing & scoring applications, conducting public background research, conducting formal reference checks, and conducting & scoring interviews?

Succession Planning, cont'd. 10

- The succession plan should also include:
 - How will professional background checks (employment history, education, certifications, financial credit history, etc.) be conducted?
 - Who will negotiate a verbal offer, then a final written offer; will the LOH be reviewed by legal counsel?
 - What role will the exiting Executive Director have in the process (team planning assistance, guidance, orientation of new ED, etc.)?
 - How will the former ED be recognized before leaving?
 - How will the new ED be introduced to the staff and community?

Succession Planning, cont'd. 11

- Boards often don't think about replacing their Executive Director until the person leaves, but, of course, that is the opposite of Planning.
 - This is often the time when the most turmoil happens that harms those we serve.
 - We should all strongly urge our Boards to have succession plans & transition procedures in place.
 - There are many excellent resources and sample templates available to guide boards in creating a succession plan (see <http://www.compasspoint.org>).

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