

Organizational Succession Planning

Organizational Succession Planning (Professionals)

Executive Summary

One of the most important responsibilities of a Boys & Girls Club's professional and Board leadership is to ensure that it continuously plans for its future professional leadership needs. However, Board and professional leaders sometimes neglect this responsibility by spending too little time or effort thinking about how to ensure the professional leadership in a way that matches the Club's future needs and strategic direction. Succession planning is a multi-step process that begins with understanding your Boys & Girls Club's vision for the future and its leadership requirements. Clubs who spend time and have strategies for organizational succession planning for professionals are positively positioned for success and continuity.

The Key Elements of Organizational Succession Planning

Developing an organizational succession plan for professionals requires an investment of time and strategic thinking to develop a leadership succession process. Organizational succession planning requires the effort of a leadership team comprised of the Board Chair, Chief Executive Officer, Human Resource Management Committee, Director of Organizational Development, and past Board leadership. The leadership team should serve as an ad hoc task team to define an organizational succession plan that is predicated on specific standards and the diversity needs of the organization. The plan should be approved and adopted by the Board of Directors and executed by the Human Resource Management Committee.

Step 1: Planning and Preparation – Staff Development

Boys & Girls Club organizations must create an environment that attracts and retains needed talent. The Boys & Girls Club must have up-to-date job descriptions, an organizational chart, and performance profiles and reviews. Boys & Girls Clubs must also create a personal career path around clear expectations, honest feedback, and appropriate compensation and benefits. Finally, the Boys & Girls Club must provide opportunities for personal growth. What staff development “systems” do you have in place? How are staff training needs “mapped” for professional staff? How are results of professional development opportunities “tracked”?

Step 2: Cultivating and Identifying Talent

Who are the valued employees within your organization? Who are the professionals that are capable of assuming advanced leadership roles? What is your “bench strength”? Professional Development and Career Planning is important to your organization and the Boys & Girls Club Movement to insure future leaders. Identifying your valued employees and providing them opportunities to develop professionally are critical to their future success, as well as your Boys & Girls Club organization. In addition to advanced training opportunities, these professionals must also be assigned specific tasks to gain actual, practical experience to better prepare them for future leadership positions.

Step 3: Strategies for Chief Executive Officer Succession Planning

What plans are in place in the event of a disability, death, or departure of your Chief Executive Officer? Does the Board leadership have a clear understanding of the Chief Executive Officer's role in organizational leadership, Board governance, human resource management, resource development, financial management, marketing and communications, program development and administration, and facility management?

What steps will the Board take to fill the Chief Executive Officer position in the event of a temporary, unplanned absence (short and/or long term) or a permanent change in the Chief Executive Officer? Does the Board know where the organization's key information is located, so that if an emergency occurs, the organization would be able to quickly continue its work in the most efficient and effective way?

- **Succession Plan in Event of a Temporary, Unplanned Absence: Short and/or Long Term**

A temporary absence is one in which it is expected that the Chief Executive Officer will return to his/her position once the events precipitating the absence are resolved. In the event of an unplanned absence of the Chief Executive Officer, a Senior Management professional immediately informs the Board Chair of the absence. The Board Chair will immediately convene a meeting of the Executive Committee to affirm the procedures prescribed in the plan or to make modifications as the Committee deems necessary.

If an Acting Chief Executive Officer is appointed, the Board leadership must review and assign current organizational projects, determine authority and compensation of the Acting Chief Executive Officer, consider temporarily filling the management position left vacant by the Acting Chief Executive Officer, determine Board oversight, and establish and implement a communications plan to key internal and external stakeholders.

- **Succession Plan in Event of a Permanent Change in Chief Executive Officer**

A permanent change is one in which it is firmly determined that the Chief Executive Officer will not be returning to the position. The procedures and conditions should be the same as for a temporary absence with one addition:

The Board of Directors will appoint a Transition and Search Committee to plan and carry out a transition to a new, permanent Chief Executive Officer. The major responsibilities of the Committee will be to contact Boys & Girls Clubs of America (Director of Organizational Development), refine job description and attributes and expertise required and desired, determine if outside consultant will be used, establish budget requirements, refine compensation package and benefits, build a timetable for the search process, prepare and publish advertisement (Notice of Vacancy Form), develop behavior-based interview guides and support documents, complete screening and interview process, complete background checks, and make offer.

Once the new Chief Executive Officer is selected, the Transition and Search Committee must confirm the appointment with the Board of Directors, make introductions to the Board and community, acknowledge current Chief Executive Officer retiring or leaving, determine transition time, publish announcements in appropriate publications, develop 90-Day Introductory Review, and engage the new Chief Executive Officer in Boys & Girls Clubs of America's Onboarding and Leadership Programs.

Expected Results

By developing and implementing an organizational succession plan for professionals, the Boys & Girls Club will prepare itself for change and will implement an action plan that best fits the needs of the organization. The organization will have a clear understanding of management and leadership needs of the Boys & Girls Club. Valued and high performing employees will receive advance skill training and will demonstrate core competencies and leadership behaviors to prepare them for potential leadership roles. The Board of Directors will be prepared for a Chief Executive Officer Transition and Search process utilizing the services of Boys & Girls Clubs of America. The best professional will be recruited and hired to fill the role of Chief Executive Officer and meet the needs of the Boys & Girls Club's mission, vision, and core beliefs.