

# Leadership Transition Planning

Presented by  
Karen Foster and Cathy Kidman  
May 7, 2014

Planning for transitions of leadership is an ongoing practice that is focused on defining an organization's strategic vision, identifying the leadership and managerial skills necessary to carry out that vision, and recruiting, developing and retaining talented individuals who have or who can develop those skills. There are three components:

1. *Emergency Succession Planning*-- A thoughtfully prepared plan to address the unanticipated departure of an executive director, usually occurring with only a few days or weeks notice.
2. *Strategic Leadership Development*-- An ongoing process that identifies the core competencies, skills and knowledge needed by your organization in the next five years along with a plan to develop those competencies in your existing talent or recruit new talent from outside the organization.
3. *Executive Transition Management*-- A course of action that board members and executive directors can employ when an executive begins thinking about leaving an organization. This enables an organization to reduce its dependency on the skills, charisma and relationships of the incumbent and conduct a successful search for new leadership.

## Elements of Executive Transition Management

- ❖ Create good endings and new beginnings
- ❖ Engage the board--the board's role in executive transitions
- ❖ Explore hiring a transition consultant and/or interim executive director
- ❖ Establish a leadership transition team
- ❖ Communicate the leadership transition to stakeholders
- ❖ Conduct an organizational assessment to uncover strengths and vulnerabilities
- ❖ Use a strategic plan to assess future leadership needs
- ❖ Translate the assessment into a leadership transition plan
- ❖ Conduct an executive search
- ❖ Announce, celebrate and support the new leader