



An introduction to succession planning

There is more to being a trustee than attending meetings

By now you will have realised that your ideal team of trustees is working well, the project is on track, its managing its resources and its making the difference it intended. What could possibly go wrong???

Have you considered what might happen if one of the trustees decides that they no longer wish to continue? Have you identified the ideal replacement? Have you got a job description, have you identified skill sets that you might need? Have you got a clear plan for working with trustees?

You should develop a succession plan for all trustees

Many organisations devise models to plan their succession and development processes with trustees. Most reflect a series of regular activities that include these fundamentals:

- Identify key roles for succession or replacement planning
- Define the competencies and motivational profile required to undertake those roles
- Assess people against these criteria - with a future orientation
- Identify pools of talent that could potentially fill and perform highly in key roles

In many organisations, over the past several years, the emphasis has shifted from job assignments to developing competencies, with a focus on managing experiences that are critical to supporting trustees in reaching the aims of the organisation. Are you giving trustees the new experiences

Individual positions

Succession planning typically covers the most senior jobs in the charity, this applies to paid staff and trustees equally, together with short-term and longer-term successors for these posts.

Roles, not jobs – the use of pools

While some jobs will always require specialists, there is a growing focus on identifying and developing groups of jobs to enable potential successors to be identified for a variety of roles. So jobs might be clustered by role, function and/or level so that the generic skills required for particular roles can be developed. The aim is to develop talented people, each of whom is **adaptable** and **capable** of filling a number of roles. Because succession planning is concerned with developing



longer-term successors as well as short-term replacements, each pool will be considerably larger than the range of posts it covers.

Four key actions for developing your succession plans

1. Change the name of the process to from Succession Planning to Succession Development.

Plans do not develop anyone — only development *experiences* develop people. Many organisations put more effort and attention into the planning process than they do into the development process. Succession planning processes have lots of to-do's — forms, charts, meetings, due dates and checklists. They sometimes create a false sense that the planning process is an end in itself rather than a precursor to real development.

2. Measure outcomes, not process

This change of emphasis is important for several reasons. First, pay attention to what gets measured and what gets acknowledged. If leadership development is not enough of a priority for the organisation to establish goals and track progress against those goals, it will be difficult to make any succession planning process work.

3. Keep it simple.

Sometimes we find organisations adding excessively complex assessment criteria to the succession planning process in an effort to improve the quality of the assessment. Since the planning process is only a way to focus development, it doesn't need to be perfect.

4. Stay realistic.

Do what needs to get done, be clear about the limitations of the succession plan, above all remember it's the outcome that's important and the outcomes are about people. Give yourself adequate time to replace trustees. Don't rush into it, there is more to this than attending meetings.

So if you are thinking about the future and want to do one thing add Succession planning to the agenda for your next meeting.