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Succession Planning Means Planning Ahead

Lay the groundwork for new leadership before a crisis hits.

By Barbara Kaufman

A university on the West Coast recently hired a president whose extraordinary vision generated great excitement. But when the board finally realized that he lacked the necessary core competencies — such as the patience to implement and the willingness to focus on fundraising — a vote of “no confidence” was inevitable. Similarly, the board of an East Coast nonprofit hired a highly creative, innovative chief executive. Unfortunately, she regularly overspent in a resource-scarce environment. If the board had realistically appraised budgetary realities and realized the need for a manager skilled in implementation, it could have avoided a painful five-year financial recovery once the chief executive was fired.

What do these two situations have in common? In each, the board conducted a rushed and disorganized job search. When a board selects a president or a chief executive under crisis-driven circumstances, chances are the new leader will begin executing her role based on a set of expectations that are not applicable or ideal. That’s why the time to rethink the requirements of the presidency or the chief executive position is *before* a crisis occurs.

Taking the time to evaluate the current president or chief executive against a set of job expectations also means periodically revisiting organizational objectives to keep them aligned with evolving priorities and directions. In this way, when someone retires or leaves to pursue another opportunity, the board can do a competent job of recruitment because it knows what the organization needs at that point in time.

Systematic and periodic assessment of the organization and its leadership is a primary responsibility of the board. It includes revisiting the mission statement, identifying challenges, opportunities, and priorities, as well as evaluating the degree to which the organization is

meeting customer or constituent needs through effective leadership. Only then will the board have a reasonable picture against which to measure a current leader's performance.

Without this "snapshot," the board often relies on the job profile created during the last search — or, worse, makes selections for all the wrong reasons. Poor decisions that backfire are often based on personal agendas, personality, or personal references. On the other hand, it makes a significant difference to make selection decisions based on the institution's direction and the type of leader it needs.

A brief set of contemporary guidelines for hiring leaders includes:

1. Planning

- Evaluate organizational performance by focusing on key questions related to mission, customer values, results, and implementation. Use a self-assessment tool that focuses on the effective execution of key leadership, management, and fiduciary responsibilities.
- Review the current job profile/position description for the chief executive and clarify current priorities.
- Identify environmental conditions as compared with the last search, differences in role requirements (e.g., internal vs. external), budget issues, and customer or constituent requirements.

2. Recruitment

- Don't allow the search committee to be hijacked by special interests groups, whether they are an alumni council, community leaders, internal constituents, or board members.
- Make role requirements clear at the onset of a search.

3. Interviewing

- Don't let a brightly shining star candidate blind the board into neglecting the needed core competencies. Some people interview well; others don't.
- Follow a formal protocol that treats every candidate equally.
- Use behaviorally based interviewing.
- Don't waste time selling the organization to the candidate. Focus on institutional fit.

4. Selection

- Don't make your selection based on likability. Do a careful background check on candidates.
- Match core competencies with real needs.
- Know what is needed and go for it. If it becomes necessary to adjust the ideal profile, do not shape the relationship with the new leader by thinking of her as the number three choice.

5. Orientation

- Spend at least as much time on orientation as was spent on the search. In some cases, you might allow the former chief executive to help with the orientation of her successor.
- Give performance feedback early.
- Explain how decisions are really made. Identify cultural landmines and current expectations from group to group: the board, customers, special interest groups, etc.

Remember: An ideal match requires a well-planned recruitment and selection process that begins long before the need for a search is discernible on the horizon.

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