

Succession Planning in a Parent Center

The job of executive director of a parent center can be very rewarding. An executive director is in the position to bring change to the lives of children with disabilities and their families. Directors, assisted by the board of directors and key staff members, are in a position to create many new opportunities for designing and shaping the growth of the Parent Training and Information Center (PTI) or Community Parent Resource Center (CPRC). By adding more programs, there are more options for families. In turn, families may then be better equipped to navigate systems and become more informed and knowledgeable advocates for their sons and daughters with disabilities.

What Is Succession Planning and Why Develop Such a Plan?

Parent Centers rely on directors who possess up-to-date skills, demonstrate multidisciplinary knowledge, and have requisite talents. This ensures that the organization is equipped to accomplish its mission and achieve its goals.

Executive directors of parent centers face many challenges. These challenges can include the need to juggle competing demands, sustain multiple relationships, and face budget crunches. Because the executive director needs a variety of skills and is so important to a parent center, a board may ask the executive director to design and put into action a succession plan. This may cover not only the executive director position but key staff positions of the parent center as well.

When succession planning is handled in a thoughtful and well-planned way, the transition offers new and exciting opportunities to the organization. Succession planning can provide directors and board members with opportunities. This can be a time of introspection whereby the organization is defining key priorities, determining what new skills and experiences are needed in new staff people, and exploring new opportunities for growth, expansion, and restructuring. The planning may include staff reassignments, elimination of outdated and outmoded programs and practices, and expan-

sions including more diversity and outreach to underserved communities. Succession planning can provide new opportunities for reaching out to a variety of stakeholders such as funders (present and potential), key staff members, board members, advisory committee members, and new community partners. Succession planning can also be a time to examine options that increase the effectiveness and the efficiency of the organization.

Trends indicate the growing need and importance of succession planning. (Neighborhood Reinvestment Corporation, August 1998). Succession planning is defined as an ongoing and strategic approach that can help an organization prepare for vacancies in key staff positions including that of the executive director. Often people think that succession planning is only about the executive director position, however, this is not so. Usually when planning only involves the position of the executive director, the term used is "Executive Transition Planning." (Goldberg, P; Barrett, S; Folger, S, PACER 2006, pending)

Succession planning can identify, access, and develop overall talent to ensure that there is continuity of leadership for all key positions in the organization. It takes a close and analytical look at what would happen if there are vacancies in key positions in the organization. A vacancy in a key position might be anticipated. For example, the executive director may inform the board of directors that she is planning to retire within the next year. Vacancies can be on an emergency basis, such as when a key member of the management staff is involved in a serious accident and the prognosis of his returning to work is not good. Effective succession planning should be interwoven into the strategic plan of the organization and should reflect the way the organization needs to evolve over a period of time to achieve its goals. Therefore, an understanding of the organization's long term goals and objectives is an essential and key element in the development of an effective succession plan.



Technical Assistance ALLIANCE
for Parent Centers
8161 Normandale Blvd.
Minneapolis, MN 55437-1044
952.838.9000
952.838.0190 TTY
952.838.0199 fax
888.248.0822 National Toll-free
alliance@taalliance.org

www.taalliance.org

Who Can Be Involved in the Succession Planning?

Individuals to consider in the succession planning process are the executive director, members of the board of directors and key staff members. Succession planning can also provide a wonderful opportunity for the executive director and the board of directors to reach out to other stakeholders.

What Are the Key Elements in the Process of Developing a Succession Plan?

There are three key elements in the process of effective succession planning. These three elements include a process that (1) recruits employees, (2) develops their skills and abilities, and (3) prepares them for advancement while retaining them, thus ensuring a return on the organization's training investment.

In preparing for succession planning, the following strategic positions can help to start the process. First and foremost, it is important to review the current operations. What positions are most critical when it comes to the parent center mission, goals and objectives, and the delivery of those services? How viable are these services in the communities presently served? A next step is to evaluate the future needs of the organization. What changes in the environment, community demographics, political climate, funding, parents' and student's needs and staff needs are anticipated?

In view of these anticipated changes it is time to take a look at current staff and determine what job descriptions need to be updated to reflect current reality and future tasks. Does the parent center have a comprehensive performance management system that includes goal setting, evaluations, and employee development plans? Is there an understanding of which employees want to move up, develop new skills or stay in their current jobs? Have employees documented their major projects and important initiatives to ensure knowledge transfer if one of them should leave? Does the organization have a plan for cross-training of staff? Has the parent center developed a procedure to annually compare employee compensation against similar jobs in the community?

If there is a vacancy, has it been determined which functions can be covered by internal staff (redistributing tasks or a promotion), a contractor, an interim, a part-time position, job sharing, or the need to hire a new employee? Are there succession plans for all key positions? Is there a promotion policy in place and if so does this impact the filling of a key position. Under what circumstance will the organization look to the outside for a new employee?

What are Some Benefits of Succession Planning?

There are many benefits that can be realized through succession planning. Effective succession planning can assure that an organization has highly qualified individuals in all positions and that employees are ready for new leadership roles as the need arises. When someone leaves, is a current employee ready to

step up to the plate, or is a process in place that can quickly and efficiently, locate a replacement? Succession planning can also help develop a more diverse workforce by allowing decision-makers to look at the future make-up of the organization as a whole.

Other benefits include:

- (1) The organization is better prepared for emergencies, as well as planned departures. There is an ongoing supply of well-trained, well-experienced, and motivated people to fill key positions as needed.
- (2) The organization retains its history and relationships.
- (3) Employees are provided with opportunities for development and growth. Often greater employee satisfaction can result when employees know that they can grow with the organization.
- (4) Stress is lessened during major transitions.
- (5) There is a process for continuous input of ideas to improve the internal processes, practices, and procedures of the organization.
- (6) There is alignment of the future needs of the organization with the availability of appropriate resources within the organization.

There are pitfalls to succession planning that can be avoided. These include plans that are too rigid and not tailored to the needs and the abilities of the personnel involved. Planners may procrastinate and wait too long before implementing movement or promotion, and the best person leaves due to the lack of movement. In some cases, the approach may appear superficial, resulting in a lack of understanding of the required procedures and processes. (The Strategy of Succession Planning, M. Dana Baldwin, Center for Simplified Strategic Planning, Inc. Southport, Connecticut 2000).

Succession planning should be an intentional activity to be understood at all levels. It should be the concern of any director who wants to attract, retain and develop staff. Effective succession planning and management development can contribute significantly to an organization's overall success.

Resources

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