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Your Board Reflects You: Succession Planning for Nonprofit Boards and Leadership

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Fundraisers, volunteers and special events come and go, but a core priority for every nonprofit should be a succession plan. Mapping out how an organization's leadership needs and legacy will evolve is, at best, a never-ending task.

Creating a proactive and methodical succession plan is necessary to identify a pipeline of future leaders. Just as important, however, a succession plan should include steps to ensure the right candidate is ready for the responsibility of leadership. Below are some considerations for seeking a future ambassador for your organization.

They are your voice

The dynamic and composition of a Governing Board is a critical component in the success of a nonprofit organization. Those who serve can enhance the charitable mission through their own efforts and contributions - or severely deter progress and even diminish the reputation of the organization.

A Governing Board is legally accountable for the actions of the nonprofit organization, so individuals who serve must be aware and willing to shoulder the responsibility. Their focus is to oversee compliance with public support regulations [the 501(c)(3) tax-exempt status], maintaining/refining policies and procedures, as well as ensuring the plans and programs of the charitable mission are implemented and enhanced. And all the while, they are conducting the three legal duties: duty of care, duty of loyalty and duty of obedience. Great care should be taken in selecting the inaugural members of the Board as well as the subsequent generations of leadership.

Determining a qualified pipeline of leaders

Qualified Board and Committee Members - and anyone in a leadership capacity - should exhibit a methodical understanding of the charitable mission along with the dedication to uphold and enhance that purpose. Profiling and due diligence procedures are necessary to filter the qualified from those whose goals may not be as altruistic.

The most effective Boards are comprised of individuals who exhibit:

- **Skills to fill the talent gap:** Be mindful to continually evaluate the inventory of talent, skills and areas of expertise of the current board. This allows for a truer sense of the talent gap that remains, and serves to efficiently identify how a prospective candidate, with the right professional and personal background, can positively impact the team's bandwidth.
- **Authentic enthusiasm for the organization and its mission.** Not just the "textbook" rendering of the charitable mission, but a true understanding and empathy for the objectives. The candidate has or gains a strong comprehension of the infrastructure and the organizational chart, as it is impossible to be an effective advocate without a thorough understanding of the entire organization. Extensive knowledge of the internal and external workings makes for impactful leadership and turns a board member into an effective ambassador.
- **The ability to interact effectively with other members.** Enthusiasm to carry out long term goals, governance and advocacy should prevail alongside the capacity to build relationships and consensus among members. The goal in any organization is to combine talents, expertise and dedication for the common good. The most productive Boards are populated with those who still remember and apply "sandbox etiquette."
- **Willingness to lend a hand with the more mundane chores.** Working on specific projects can actually provide greater insight into the organization and can enhance the board experience.
- **Natural inclination to support and/or assist in fundraising efforts.** This is a quality that seems difficult to find in a prospective Board or Committee member. Many are willing to make a financial commitment to comply with a Board Policy, but consider their "duty" completed. A consistent comment among members is that they are not comfortable "asking for money." No organization expects a Board Member to become a Major Gift Officer; however there are situations where including a Board Member in a donor conversation can be a powerful influence.
- **Intuition to know when their work has been accomplished.** Board service can be fulfilling, and many who offer their time and talents often report that their sense of satisfaction exceed their commitment. It is important to consider too that burnout will diminish effective impact. Dynamic board policies incorporate term limits to combat burnout or provide a practical exit for an individual who becomes less than productive. Time off can provide the objectivity to determine if the desire to serve remains strong and if so, enable that Board Member to return with a fresh perspective.

Assessing a candidate's qualifications

Establishing whether prospective successors possess the requisite criteria and motivation can be daunting. One way to begin the vetting process would be to generate - and keep current - a brief overview of the expectations of a board member. Providing the time commitment, required duties of board service and conflict of interest policies will clearly define prerequisites. If a candidate raises objections to any, they are not a good fit.

In addition, here are some strategies organizations have implemented for effective succession planning:

- **Endorsements from current or retiring Board Members** or Committee members to identify qualified, dedicated individuals for consideration.

- **Looking within to those who have served as Volunteers, on Committees or Projects.** Current service can demonstrate strength of commitment and potential leadership skills.
- **Opt for a questionnaire to vet candidates.** A Board Application or Questionnaire can help vet for goals and expectations. Candidates who pass this phase can be interviewed by a selection committee to determine if their personality and motivation will assimilate in the existing board. This information can help guide the selection of the right mentor to promote the transition to functioning board member.
- **Broaden your pipeline with diversity.** In profiling potential candidates, consider experience and personality, in addition to gender, age, culture and, where relevant, geographic location. In an era where relevancy is a concern for most organizations, broadening the dynamic can establish the bridge to all generations.

Mapping out solid and systematic leadership succession planning is crucial at all levels of a nonprofit organization. It is the only means of protecting the charitable mission and reputation of the organization. Because Board service can be both gratifying and challenging, it should not be offered without due diligence to ensure new members share your complete commitment to the success of the organization and the preservation of its legacy.

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