



Succession Thoughts You're Not Thinking

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Let's Take a Pulse

- 39% of CEOs/Eds in Rescue Missions are planning to leave in the next 5 years
- From now until 2030, 10,000 Baby Boomers (born 1946 – 1964) will hit retirement age each day. Each day, 5,900 leave the workforce. (Pew Research Center)
- Baby Boomers have contributed the largest number of workers historically
- Five Generation Workplace

Builders	2%	born before 1946
Boomers	25%	born 1946-1964
GenX	33%	born 1965-1980
Millennial/Y	35%	born 1981-1996
Z	5%	born 1997+
- In a 2019 survey conducted by Transamerica Center for Retirement Studies, 55% of workers expect to retire after the age of 65.

The Time Is Now

- **Succession Planning**

- ✓ The future-focused practice of ensuring that an organization's needs are and will be met, from a staffing perspective, by identifying the knowledge, skills and abilities to perform certain functions and then developing a plan to prepare multiple individuals to potentially perform those functions.
- ✓ Prepare and facilitate smoother transitions when key roles are vacated and need to be filled.

- **Proactive & Intentional vs. Reactive**

- **Capture organizational/ministry history and knowledge**

- **Intentionally invest in current employees**

Challenges

- Takes time and attention
- It's A Lot
- Requires flexibility, adaptation, updating


Rewards

- Millennials (and many others) want to know what the plan is
- Increases employee engagement
- Organization is increasingly focused and prepared to navigate transition and growth



Succession Planning Is Not A Solo Endeavor

- Board
- CEO/President
- Key Leadership
- HR
- Consultant

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- Key Organizational Information
 - Organizational Core Values
 - Key Leader Requirements and Expectations
 - Planned
 - Unplanned

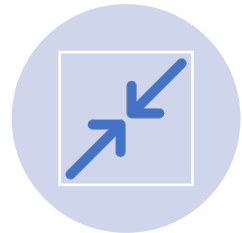
Look Forward to What The Ministry Needs & Wants



Maintenance



Growth



Turnaround or
Re-establish



Hard to Follow

When Searching to Replace a Key Role

1

Know your non-negotiables and don't waver

- Values Alignment
- Leadership Style
- Ministry Purpose & Mission Statement
- Ministry Position on Faith
 - ✓ Organizational Religious Exemption
 - ✓ Government Money

2

Be Unanimous

3

Conduct Due Diligence but Don't String People Along

Questions For The Board To Answer

1. Describe what you believe is important in the next CEO; what type of leadership is needed?
2. What character qualities do you think are important to be successful in this role? Please note whether you think the qualities listed are Essential (E) or Valuable (V).
3. What competencies and knowledges do you think are essential to be successful this role?
4. What do you think are and will be the most important functions/responsibilities of the CEO position?

Planned vs. Unplanned

1. In a planned succession scenario:

- How much notice would you like to receive from the current CEO?
- How much overlap (outgoing and incoming CEO working together) do you think would be beneficial/ideal?
- Do you think that a successor could come from within the ministry?

2. In an unplanned absence of CEO:


- Do you have an opinion about who could step in to fill the gap?
- If so, for what period of time do you think this would be reasonable/doable?




Succession planning should be directly tied into organizational plans and goals.



The Board and current CEO should discuss on a regular basis the succession plan and associated development plan with the current CEO.



The CEO should discuss, on a regular basis the succession plan and associated development plan with each of their C-suite or Directors.



CEO to C-Suite or Directors

1. Who could step into your role now, if necessary?
2. Who is in your pipeline for possible succession?
3. What are you doing to develop them?
4. Do you have an estimate of how long until each is ready?
5. What can we do to support you in this? What do you need from us?

Leadership

- Do whatever it takes; can't fall to someone else. Availability 24/7.
- Able and willing to make really tough calls sometimes.
- Manage people consistently and with clear direction.
- Motivating and empowering others to do their job.
- Developing and retaining trusted leadership team; delegate so that they run the primary day-to-day of the Mission.
- Oversee the entire Mission and understand all of its parts, no matter how large or how small.
- Visionary
- Developed leadership skills, prior experience.

Values Alignment

- Uncompromising Christian values. Ability not to waiver from those.
- Ensure a strong Christian focus and atmosphere.
- Servant heart for the people the Mission serves.
- An understanding and embracing of "Rescue", "Recover", "Restore".
- Ethical, Integrity, Honest
- Ability to listen and to act as God would require.
- Exercise discernment and good judgement.
- Knowledge of addiction/recovery and destructive behaviors.

Relationship Building

- The ability to gain respect from members of the general public and leaders in the community.
- Well spoken, self-confident, able to comfortably and with discernment talk to donors and the press.
- The ability to work with the board and be accountable and open to criticism.
- Internal and External
- Knowledge of where to look for answers and a willingness to ask for help on tough issues.
- Collaborative and supportive of staff.
- Presence in a local church.
- Effective communicator; be the presence in the community.

These are the abilities and characteristics that the organization identifies as key success factors of roles across the organization.

Financial Oversight

- Financial literacy to understand the Mission Finances.
- Attention to detail.
- Keep a close eye on the finances ensuring accuracy and accountability.

Strategic Thinking

- Visionary
- Optimistic in identifying opportunities and/or challenges with the ability to put strategic initiatives and plans in play.
- Develop long term strategies to sustain and enhance the Mission.
- Keep up-to-date with CityGate Network, new legislation and other matters of import.

Fundraising

- Knowledge of current development strategies.
- Ability to foster, develop and retain strong donor relations, especially of major donors.

Critical Communication

Who Will Communicate

- Departing CEO
- Board
- Other

To Whom

- Key Shareholders
- Internal
- External
- Press

When & How

Consistency in Communication



Strengthen Your Bench

1. Assess Current Staff

- Upholding Core Values – pay attention to how this plays out or is evident
 - Character
 - Competencies
 - Knowledges
 - Interests
- ✓ *Are there any other jobs in the organization that you'd like to do or try?*

2. Identify “High Potential Employees”

- Maintain High Ethical Standards
- Demonstrate Strategic Insight
- Inspire others to High Performance
- Focus on Results
- Strong Team Player

Strengthen Your Bench (continued)

3. Hire fantastic people – Swing for the Fence

- Embrace Organizational Values
- Aligned with ministry philosophy
- Look for people who excel in diverse, unpredictable, and complex workplace environments

4. Work with HR

- Aggressive and Targeted search
- Intentional and Specific Interview Process

Invest – Current Employees

1. Define what is needed:

- Learn new technologies
- Build/Expand skills and knowledges
- Tackle leadership assignments
- Step into new roles

2. Involve the Employee

- Communicate big picture of succession planning
- Communicate specific to employee
- No promises made

Invest (continued)

3. Develop

- Relevant Leadership Skills
- Mentoring & Leadership Coaching
- Give Opportunity to
 - be exposed to various roles and responsibilities
 - to lead/be responsible

4. Allocate Resources

- Across the board – Education and Training Benefit per year
- Specific to Employee

Miscellaneous Thoughts You May Not Have Yet Thought Of

1. When a promising employee leaves you, stay in touch. Nurture the relationship.
2. Build or Enhance your reputation within your community/industry
 - Work/Life Balance
 - Culture
 - On-Going Education & Development
3. Consider Cross-Departmental Teams to tackle projects or initiatives
4. Think beyond individual Missions
5. Establish a transparent timeline for CEO Succession
6. Remember, we are all in transition