



The Council for Health &  
Human Service Ministries

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United Church of Christ

# Succession Planning

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## Building Organizational Resilience

# Session Objectives

- Develop an understanding for how succession planning can provide an organizational framework for developing and retaining staff
- Gain tools and processes for implementing a successful succession planning program
- Realize why an organization's fiduciary commitment to succession planning protects and fosters its faith-based mission, thereby ensuring the resiliency of its mission

# Succession

consecutively

sequence

one

line

row

continuation

uninterrupted

progression

# Succession

People sharing a specified characteristic and following one after the other.

The action or process of inheriting a title or position.

Following one after the other without interruption.

# Resiliency

tough   sturdy   flexible  
strong

buoyant   adaptable   hardy

# Resiliency

The capacity to recover quickly from difficulties; toughness

# Planning

- Documented
- Purpose
- Goals
- Action
- Measurable
- Reviewed and revised



# Succession Planning

Intentional effort to:

- Identify team members with high-growth potential
- Provide opportunities for development
- Empower and engage team members

With the goal of preparing team members for new responsibilities and roles within the organization.



# Building the Case

98%

CLA: Senior Living Trends

# Building the Case

45%

Bureau of Labor Statistics. <https://www.bls.gov/news.release/jolts.t16.htm>

# Building the Case

\$4,000

Berris, J. (2021) The State of Caregiver Turnover and How to Turn It Around.  
<https://www.onshift.com/resources/blog/the-state-of-cna-turnover-tips-for-turning-it-around>

# Building the Case

4.9 yrs.

Magnani, D. (2020) *Average C-Suite Tenure and Other Important Executive Facts.*

# Equipping the Organization

- Strategic Readiness
  - Strategic plan is in place and being implemented
  - Board is engaged and committed to their development
  - Board and chief executive are in sync
  - Operational performance is steady
  - Trust is high

Benefits those you serve and the team and makes the organization more attractive to future chief executive candidates

# Equipping the Organization

- Cultivating future leaders
  - Expectation of and supported by the board
  - Ongoing priority of chief executive
  - Focus is to create 1-2 internal candidates

Enhances and strengthens the leadership capacity of the whole organization

# Chief Executive Transition

- Board should have a documented plan
  - Short-term (less than 30 days)
  - Extended (over 30 days)
  - Permanent
- Announcements and ongoing communication
- Search process

# Chief Executive Transition

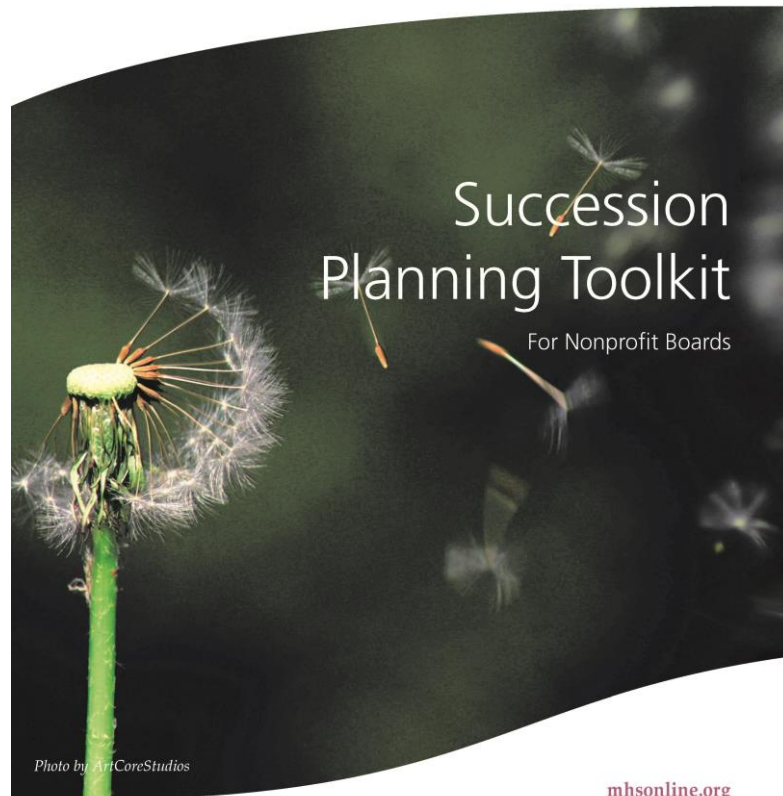
- Outgoing executive
  - What keys tasks, priorities or deliverables should the outgoing executive be responsible for?
  - What role will the departing executive play in the search process?
  - How will the board acknowledge and celebrate the departing executive's contributions?



# Chief Executive Transition

- Incoming executive
  - How will the person be welcomed to the community/organization?
  - What is the orientation plan
  - How will the person be supported in the first year?

# Tools



## MHS Succession Planning Toolkit

Found at: [www.mhsonline.org](http://www.mhsonline.org)

Navigate to **RESOURCES**  
and then **GOVERNANCE**  
**RESOURCES**

# Developing the Plan



- Key position analysis
- Training needs assessment
- Org. and Individual development plans
- Designate financial resources
- Monitor and measure progress

# Areas for Development

Skill	Percent who would attend
Technical Knowledge	86
Leadership Skills	81
Innovative thinking skills	76
Management skills	76
Dealing with conflict or difficult people	74

Straw, Scullard and Davis. (2013). *The Work of Leaders: How Vision, Alignment and Execution Will Change the Way you Lead.*

# Generations in the Workforce

Baby Boomers  
(1946-1964)

Leadership Coaching  
Mentor Roles  
Define goals and  
deadlines

Generation X  
(1965-1980)

Remain open to their  
suggestions  
Show respect  
Leadership Coaching

Millennials  
(1981-1996)

Leadership dev.  
Opportunities  
Leadership Coaching  
Results

Generation Z  
(1997-2012)

Development  
opportunities  
Leadership coaching  
Non-traditional  
learning

*Leadership  
Development for  
a  
Multigenerational  
Workforce.  
Sounding Board  
Inc.*

# Tools

## DiSC

Provides opportunity for personal awareness and growth, while developing a deeper understanding of relationships in the workplace



# Tools

## CheckPoint 360<sup>o</sup>™

Develop Leaders That Get Results

- Evaluates effectiveness
- Identifies talents, gaps and focus areas
- Personalized development plan
- Self-assessment
- Supervisor, direct reports, peers and others feedback
- Ability to add comments
- Communication
- Leadership
- Adaptability
- Task Management
- Relationships
- Production
- Development of Others
- Personal Development

# Tips/Other Ideas

## Career Ladders





# Tips/Other Ideas



Internship  
Program

# Tips/Other Ideas

Diversity



# Tips/Other Ideas



Project Teams

# Outcomes

- Increased engagement
- Reduced turnover
- Lower costs
- Greater stability
- Stronger culture
- Better outcomes



Leading to protection and fostering of the organization's mission

# Wrap-Up



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