



THE VIEW FROM OLIVE GROVE ON LEADERSHIP SUSTAINABILITY PLANNING

Olive Grove is winding down its yearlong leadership sustainability initiative, with our final thoughts coming to you in our newsletter, going out next Wednesday. Today, we wanted to use *The Pit Stop* as a forum to provide you with a few easy tips to tackle this somewhat prickly issue.

Our leadership sustainability initiative started in the Spring of 2010, with a survey of our client's executive directors and board chairs, to explore their intentions, actions and concerns about leadership sustainability planning. Our research uncovered some pretty scary facts:

- ❖ **65%** anticipate leaving their position within the next four years.
- ❖ **85%** do not have a written leadership sustainability plan in place.
- ❖ Their **top four barriers** are time, funding, organizational culture and knowledge.

An organization without a plan for its future puts all of its stakeholders at risk, and one failed leadership transition could be the end of an organization's life. When leaders, founders, and board members become ingrained in the organization's very beings, it becomes very difficult to manage transitions, because institutional knowledge resides in a person's brain rather than in internal documents and systems.

Facing succession planning or a leadership transition can be emotional for some leaders that have become deeply attached to an organization and don't know how to define themselves outside of their work. No one likes to think about leaving their security, their passion, their purpose. However, doing leadership sustainability planning is actually healthy for an organization and by engaging in this planning, you are setting the organization up for continued success even after a significant staff departure.

We at Olive Grove want to make this process as comfortable as possible for organizations and their leaders, so here are five easy ways to get started:

1. Take 15 minutes at your next board meeting to discuss "Which position would cause the most disruption to our agency's ability to serve our mission if that person disappeared tomorrow?" Brainstorm three specific, achievable actions the organization could take in the next month to help mitigate that risk. Report back at the next board meeting.
2. For every new hire, make one of their 6-month objectives to create an emergency succession plan for their role. Evaluate them on whether they have

completed it. Make sure all of these are saved on a public drive in the event of an unexpected transition, and update them at least once annually.

3. Ask your Executive Director if she has thought about how all of her hard work and legacy will continue when she decides it is time to retire to Tahiti. She might not delve into succession planning immediately, but it will at least start the conversation, which is half the battle.
4. Hire a free intern to shadow your program manager or another key staff member for a month and document everything.
5. Cross-train one employee on critical financial tasks to make sure you can deposit income, reach your bank and accountant, and make payroll in an emergency. Make sure the financial and other organizational accounts and passwords are stored somewhere that is accessible to at least one other staff member.

These tips are by no means comprehensive, but we hope that they can help your organization broach the conversation around leadership sustainability planning. Hey, it may even inspire your Executive Director to start checking out those Tahitian beaches she's been dreaming about.

