

# THE **INS** GROUP PLAYBOOK



## GOAL: Succession plan to stay in the game.

### A Message from Our Head Coach

One of the topics I get asked about the most is succession planning, but it is also an activity that many organizations don't address until there is an urgent need for it. Navigating team member transitions without proper planning in place forces a reactive approach that threatens organizational sustainability. It also creates an uncertain and stressful environment that negatively impacts stakeholders.

*"One of the things we often miss in succession planning is that it should be gradual and thoughtful, with lots of sharing of information and knowledge and perspective, so that it's almost a non-event when it happens."*

– Anne M. Mulcahy

In this issue of the Playbook, we discuss the importance of taking a proactive and thoughtful approach to succession planning. It is worth the investment as people transitions are one of the biggest challenges that an organization will face. How an organization handles these situations has an impact on its ability to maintain successful operations.

Not sure how to begin? We share five strategies that your organization can immediately use to get started with succession planning or take your current approach to the next level. Our Take Five activity encourages people to think through and document a succession plan for their current position. We also

share research that shows the nonprofit sector has an opportunity to focus more on investing resources into these activities.

Our client feature highlights our work with Aventura Children's Mentoring to develop processes that prepare their team for emergency and planned departures. It was truly a team effort that engaged their diverse stakeholders to provide input to develop comprehensive plans that are tailored to their organization's needs. I hope their story inspires other organizations to assess if they are prepared for these situations and to take action to plan accordingly.

I encourage you to embrace succession planning as an opportunity to strengthen your team's ability to maintain a stable and healthy work environment when people leave the organization. Please [contact our team](#) for a complimentary consultation to learn how we can help make departures easier for everyone involved.

*Ruth A. Peebles*

**Ruth Peebles, MPA**  
President & Founder



### Five Strategies to Win at Succession Planning

Succession planning is an important activity for any organization and its team. In the world of sports teams, this involves managing a roster of players, coaches, and support staff to ensure consistent coverage for all the team's needs. It also includes having a contingency plan for every situation that will impact the team's ability to execute its main function—showing up game ready with all its people in place. Numerous situations can derail a sports team and succession plan protocols are available to manage them. Nonprofits can learn a lot from the amount of attention, resources, and planning that these organizations do to effectively navigate people transitions to have the least negative impact on their team and organizational performance. We are sharing strategies to help your organization use succession planning as successfully to maintain sustainable operations.

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## The Stats Are In...

Data from [BoardSource's 2021 report Leading with Intent: BoardSource Index of Nonprofit Board Practices](#) found:

Only **29%** of organizations surveyed have a **written succession plan** for an ED transition.

Only **27%** have a **written emergency backup plan** for handling unexpected executive departures.

**73%** of chief executives are **working without an employment contract**.

Only **45%** of chief executives rated their **job satisfaction** "extremely satisfied".



## Take 5

Have you thought about what succession planning looks like for your current position? Whether you are an employee or a board member, taking the time to think through the steps to transition out of the position is a valuable and enlightening exercise. What institutional knowledge do you have that needs to be documented so it can be shared? What have you learned in the role that would help someone else succeed? Are the roles and responsibilities an accurate reflection of the position and the work that you do? The answers may surprise you! To standardize this activity across positions, we encourage organizations to create a checklist of items to address and document. When the time comes to make a change, the preparation will lead to a positive transition experience for both individuals and the organization.



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## Succession Planning for Organizational Sustainability

In 1999, [AventWest Children's Mentoring \(AWCM\)](#) was founded by community members as an after-school tutoring program for children in the AventWest community to have a safe place to do homework and play. The program expanded its offerings with the launch of Kids Café, a Food Bank of Central and Eastern North Carolina pilot program supplying hot dinner meals to participants. The program currently serves up to 70 students per year at its two sites, Avent Ferry United Methodist Church and Western Boulevard Presbyterian Church in Raleigh. Committed volunteers meet a vital need in the community by providing mentoring and tutoring services to academically at-risk students. The program is anchored in its pillar values of healthy minds, healthy bodies, and healthy relationships to help students build self-esteem and life skills that will help them succeed both in the classroom and in life.

The AWCM team is also committed to its organizational health and connected with The INS Group to work on ensuring sustainability through any circumstance. As we all learned through the pandemic, any situation can arise at any time that affects an organization's ability to continue its work. In this case, the organization identified an immediate need for help recruiting a new Executive Director (ED) and an opportunity to implement procedures for succession planning. The INS Group worked with the AWCM team to develop and execute a hiring process that engaged stakeholders across the organization with this pivotal transition. "We were able to hear different voices from our organization to understand our needs and expectations for the new Executive Director. The recruitment guide and timeline The INS Group provided outlined the roles, responsibilities, and expectations of our team to manage all aspects of the hiring process so there was no guesswork on what needed to be done," shared Patience Wells, Chair, AWCM Board of Directors.

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