

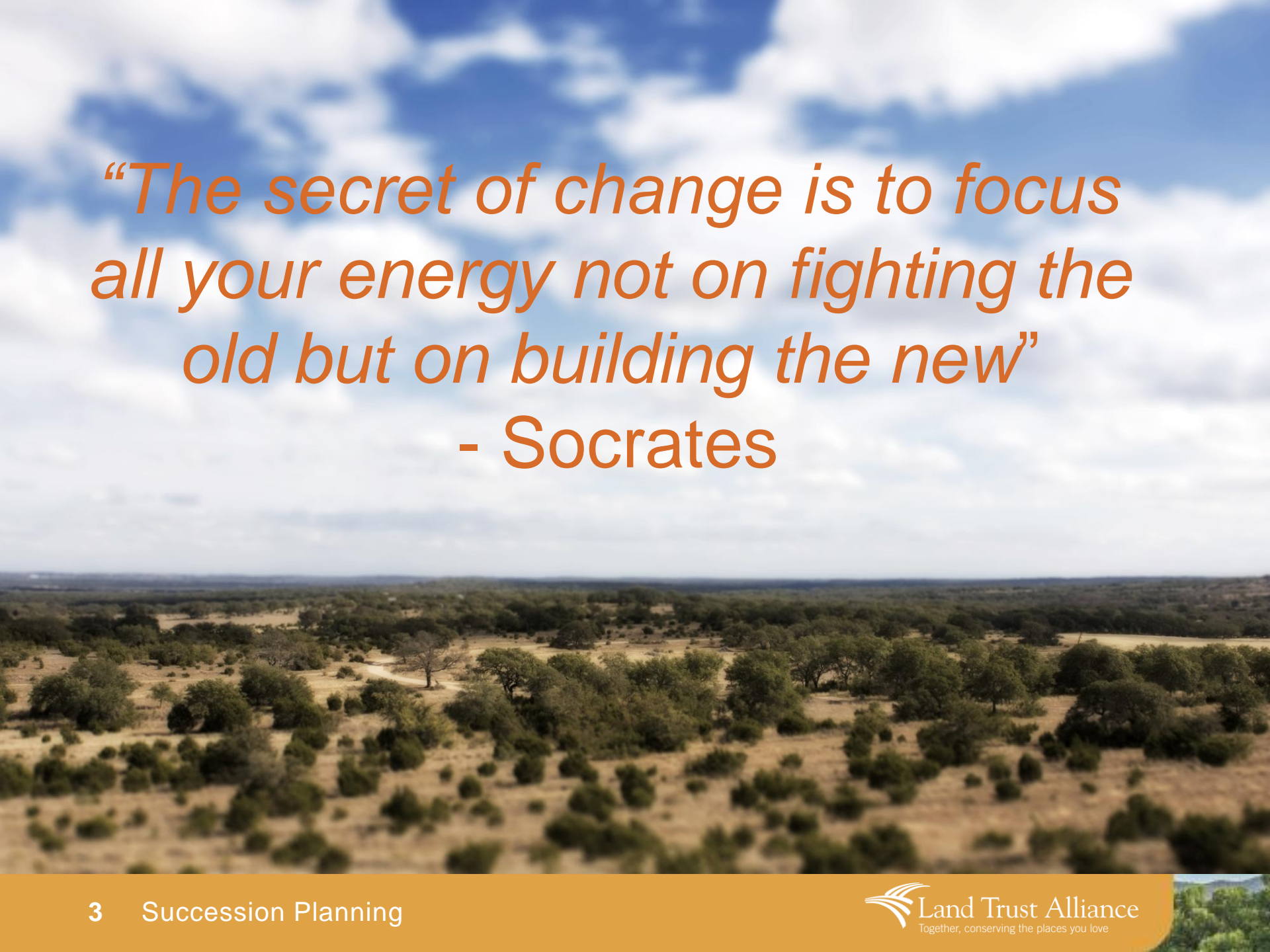
# Succession Planning

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# Learning Objectives

- Embrace the inevitability of transition
- Understand why your land trust needs a succession plan
- Learn about two types of succession plans
  - Emergency succession plans
  - Strategic succession planning



*“The secret of change is to focus  
all your energy not on fighting the  
old but on building the new”*  
- Socrates

# The Case for Succession Planning

- Risk management strategy
- Planning opportunity
- Builds leadership in the organization

# Why don't we do it?





# Emergency Succession Planning

# Why do you need an Emergency Succession Plan?



- The unexpected happens
- Framework for decisions
- Guidance for governance
- Details big and small

# Emergency Succession Plan Questions:

- Organizational Questionnaire
- Procedures
- Temporary staffing
- Standing Appointees
- Board oversight
- Compensation
- Communications



# Emergency Succession Plan Components

- Nonprofit status
- Financial information
- Human resources information
- Facilities information
- Building management
- Legal counsel
- Key stakeholder contacts
- Insurance information

# How to develop your plan....

- Ask the right questions
- Staff driven – board adopted
- Express Learning Kit

LAND TRUST ALLIANCE  
.....  
EXPRESS LEARNING KIT

EMERGENCY Succession Planning: On  
the Pathway to Sustainable Leadership

(see handout)



# Strategic Succession Planning

# Not Just for Executive Directors!

- Other key staff positions
- Board leadership
- Board membership



# Who's responsibility is it?

- Board of Directors
- Executive Director
- Leadership Team



# The Process

- Analysis and planning
- Defining the job
- Identify potential successors
- Individual development plans
- Search and Selection
- Transition

# Products

- Leadership map
- Internal successor assessments
- Individual development plans
- External candidate list
- Long term succession plan

# Real life examples

- No plan – train wrecks
- Planned successions with overlapping tenures (the good and the bad)
- Planned succession without overlap
- Interim Directors and Transition Directors