



CONSERVATION
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Succession Planning for Stability and Sustainability

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Conservation Consulting Group

- Founded in 2009 as a partnership of colleagues/friends
- Strategic Planning
- Needs Assessments
- Guided Organizational Assessments
- Board/Governance Development
- Accreditation Preparation



Conservation Consulting Group

Nancy Moore, Managing Partner

- More than 35 years of experience in nonprofit leadership and management
- Nonprofit consultant for 17 years
- Senior Examiner for *Illinois Performance Excellence*
- International adventure travel Expedition Leader
- Elected member of the Monona City Council

David Allen, Partner

- 30 years raising money by asking
 - 13 with TNC Chapters in OR, TX, and WI
 - 10 with Sand County Foundation
- Membership Systems to \$18MM Capital Campaign
- Consulting PT since 2004; FT since March 2009



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Land Trust for Tennessee

- Founded in 1999 by Phil Bredesen, Jeanie Nelson and Board
- Accredited in 2009 and re-accredited in 2015
- Focus on: Historic Land, Working Farms
Recreational/Scenic Landscapes, Water Protection, Urban Open Space, Wildlife Habitat
- Over 120,000 acres protected statewide



Land Trust for Tennessee

Emily Parish, Vice President of Conservation

- Been with Land Trust for 14+ years
- Oversees team of 8 conservation and stewardship staff members
- Member of Conservation Defense Advisory Council; former member of Standards and Practices Advisory Team



Land Trust Standards & Practices

Standard 7: Human Resources

D1: Transition Planning

“Develop a written process or plan to provide for continuity in the leadership and management of the land trust’s functions”

Succession Planning

Two Types:

**Emergency (Crisis/Contingency)
Planning**

Leadership Transition Planning

Risks of NOT Planning: Cases in Point

- A tragedy strikes
- Estate plan bamboozle
- Leader as hoarder

Emergency Planning

Spells out what temporary leadership or management of core functions is needed in the event of an unplanned event

Emergency Plan

- Provides much needed ***stability and calm*** in a time of turmoil
- Defines what tasks and responsibilities need to be carried out – and by whom – in the short term
- Includes a current inventory (***in duplicate!***)

Who's on First?

- Communications (internal & external)
- Inventory of materials & equipment, service providers, key stakeholders (and related security and operational protocols)
- Interim division of responsibilities
- Lines of authority (and compensation)
- New leadership search



Consider...

- Cross-training of staff or Board who are expected to assume responsibilities in transition
- Annual review to discuss, adapt, ***adopt*** and distribute
- Schedule a **fire drill**

Leadership Transition Planning

Identifying and preparing new leaders to replace older leaders when they leave, retire or die

Leadership Transition Planning

- Ensures *sustainability*
- Builds bench strength - increases the availability of experienced and capable Board and staff that are prepared to assume roles
- Proactive and systematic application of extremely valuable human resources

Consider...

There are only TWO gifts we
can give the organizations
we love

Lead with Distinction

- Navigate for the greater good
- Commit to learning & the application of that learning
- Work to bring out the best in others
- Serve generously
- Be audacious
- Set personal leadership goals in the context of the organizations goals



Plan our Exit

Our organizations *must* last in **perpetuity** – we are “term limited”

Our legacy (and *our organization*) is not only dependent upon our accomplishments but ***the grooming of those who follow us***



Benefits

- Prevents a power vacuum (leadership gap) and ensures continuity in work
- Invaluable institutional knowledge and history is captured and remains with the organization
- Improves efficiency and effectiveness of operations and governance – less scrambling or reinventing of the wheel every time people leave

Benefits

- Ensures the infusion of new blood – new talent, time, treasure, ideas into the organization
- Allows for the evolution of leadership skills/needs as the organization itself evolves, changes, grows
- Creates the *critical* opportunity to acknowledge and celebrate the contributions of those who are stepping aside



Board Leadership

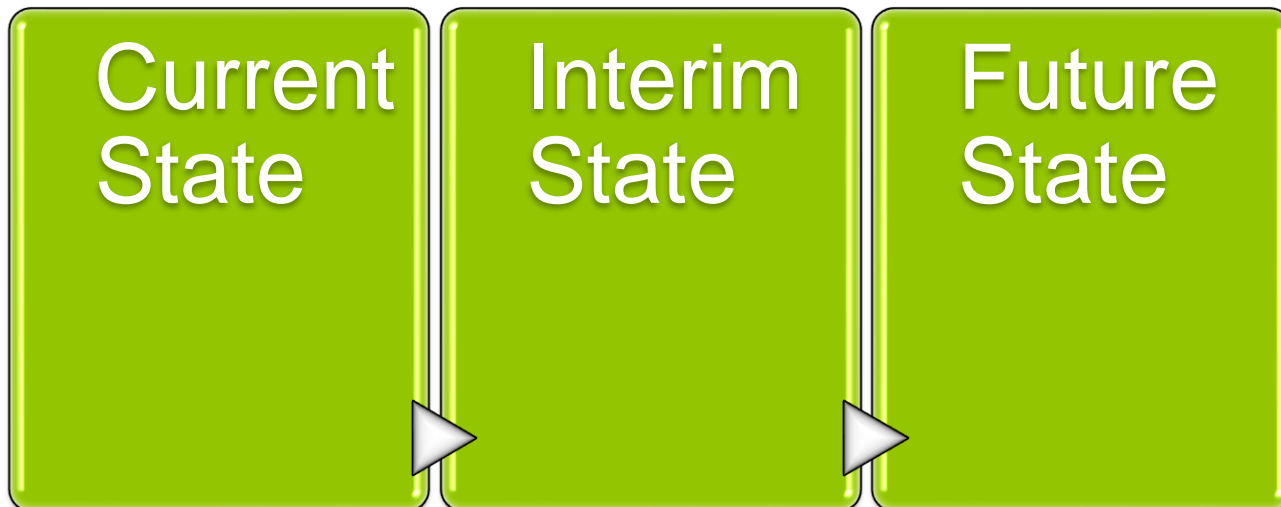
- Adopt term limits – overall and for key leadership positions within the Board
- Rethink Board “orientation”
- Key position & committee SOP’s
- Identification and cultivation of new leadership
- Training and mentoring of those identified (including relationships)
- Acknowledgment, celebration and new role



Staff Leadership

Plan Your Work & Work Your Plan

Time is Your Friend



Internal Focus

- Transfer of specific management responsibilities
- Maintaining progress on high priority projects
- Providing stability & managing anxiety:
 - Among staff
 - With Board
 - Service Providers/Vendors



External Focus

- Messaging of opportunity & strength
- Transfer of key relationships:
 - Donors
 - Community Partners
- Gratitude

Current State

Capturing the critical:

- Job descriptions/formal & informal roles
- Annual reports & SOP's
- Critical Inventory
- Eye on the prize (s)
 - Position goals/issues
 - Critical strategies/knowledge/relationships

Interim State

Taking stock:

- In-house staff: roles and (new) responsibilities
- Cross-training and/or other professional development needed
- Compensation for taking on (new) charge
- Bridging of critical needs with temps
- What could you (your organization) let go of?
- Checking in



Future State

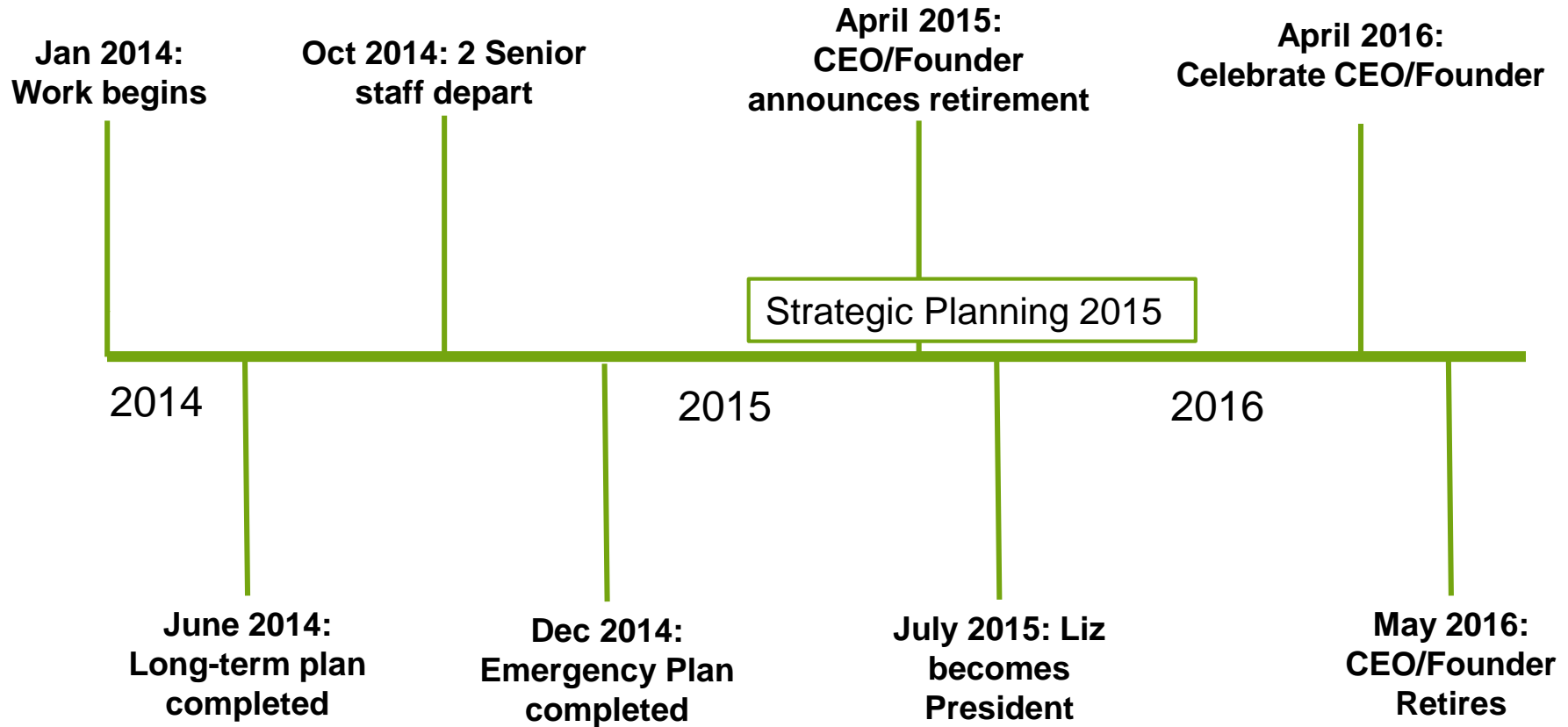
- What leadership do we need and what impact might that have on the whole?
- Role (if any) *and timetable* of the former leadership in “orienting” new staff
- Celebration, acknowledgement (and long term role) of those stepping away
- Opportunities to leverage change

New Leadership

- Board support
- The listening and learning tour
- Attention to organizational culture
- Developing a new strategic plan



Case Study: Land Trust for Tennessee



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The LAND
TRUST for
TENNESSEE

Land Trust for Tennessee Lessons Learned

- CEO role during transition period
- Raising funds in honor of CEO
- Planning should look at all senior staff, not just CEO/President (ex- Finance)

Land Trust for Tennessee

Key Steps since Transition

- Staff re-organization
- Board re-organization
- Organizational culture



The Intervention

- Establishing a sense of urgency
- Enrolling the right champions
- Vision
- Grounding the vision/need
- The “Talk”
- Planning begins

?? Q & A ??



Six Steps You Can Take **RIGHT NOW**



1. Draft an emergency succession plan for key leadership (including Inventory)

2. Adopt term limits for Board members and *all* leadership positions

3. Write (or update) leadership/job descriptions for *each* leadership role (paid *or* volunteer) – including skills, requirements and qualities you look for

4. Identify people *within* your organization you feel would fit well (or have the potential to fit well) in the leadership positions you've documented (pipeline/spreadsheet)

5. Develop and implement a cultivation plan for all those you have identified

6. Develop and practice your case to ask current leaders to mentor, shift roles and ask “newbies” to step up



First I will prepare and then my time will come

- *Confucius*

THANK YOU!

