

Creating a Successful Presidential Search & Transition Plan

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Overview

Presidential leadership transitions are fraught with both opportunities & risks. Effective Boards plan well in advance, formulating policies and procedures to pass the leadership baton with clarity, grace and continuity.

- Understanding the dynamics of transitions
- Preparing for the eventuality of a transition
- Guiding the transition process
- Creating policies for the search, selection and onboarding of the next President

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The Acceleration of Presidential Leadership Transitions

- Presidents are “aging out” at an increased rate
- More are “burning out” due to multiple factors and unanticipated demands
- Presidential roles are “scaling up” demanding different skills and models than in the past causing incumbents to step away sooner and/or Boards to facilitate changes.

Transition Risks

- Dilution of legacy essentials and loss of institutional memory – note value of exit briefings
- Slowing of missional momentum
- Assuming current job description of departing leader is sufficient for what's needed next
- “Married” to finding a leader just like (or not like) the one leaving
- Not discerning the impact on corporate morale and culture and mediating the impact
- Mismanaging fears and/or misperceptions about leadership change by stakeholders
- Not considering the expectations of direct reports and colleagues impacted by a new leader
- Being too slow or too quick with the decision.

Major Steps in Transitioning Presidential Leadership

Transitioning Steps

- Transition policies and procedures established well in advance
- Assessing the organization's readiness for the next leader
- Deciding on whether interim/transitional leadership may be needed to resolve significant issues or provide a buffer zone for the acceptance of a new leader
- Determining the leadership priorities – what worked before may not work with what is before you

Transitioning Steps

- Understanding the essential elements of “fit” with the organization’s mission and culture
- Identifying the experiences and skill sets the position will require
- Establishing the performance metrics needed to measure leadership effectiveness

Transitioning Steps

- Defining the search and selection process thoroughly
 - Who makes the final decision on the selected candidate?
 - Who will be involved in defining the leadership essentials, interviewing candidates and recommending finalists?
 - How will the search be conducted (search firms, self-directed, facilitated by a consultant)?

Transitioning Steps

- Ensuring that the departing leadership is appropriately acknowledged/celebrated.
- Implementing a comprehensive “on-boarding” process for the new leader.
- Shepherding the leader through the first year with regular feedback on key performance expectations and measures of effectiveness.

Both Appointed and Anointed

- The critical role of spiritual discernment for all involved
 - Acts 15:28 It seemed good to the Holy Spirit and to us
- The undergirding responsibility of prayer
- The assurance that those whom God calls He also equips
 - I Thes. 5:23-24 Now may the God of peace himself sanctify you completely, and may your whole spirit and soul and body be kept blameless at the coming of our Lord Jesus Christ. 24 He who calls you is faithful; he will surely do it.

Leadership Transition Resources in ABHE Downloads

- “Successful Leadership Transitions”, David Gyertson,
- “Succession Plan Policy” Robert Andringa
- “ Succession Plan Policy – Simple Example” Robert Andringa
- “Succession Plan Policy – Template” Transition Guides

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Questions, Comments and Discussions

I am available for consultation.

Please contact me at:
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