

Succession Planning and *GBAT*^o

There are three major components of a succession process: Transition, Search Process, and Start-up. The description below is designed to indicate how data from the *GBAT*^o can integrate into these three components. (This is not designed to provide a comprehensive description of all the aspects of a succession process).

Transition Plan

The purpose of a transition plan is to prepare a governing body to move forward into the next phase of its external and internal development with a new leader appropriate to those developmental tasks with a minimum of spiritual, programmatic, material, and people losses during the transition.

The *GBAT*^o information integrates into the following aspects of this plan:

Remedial Action

What are issues in the departure that need to be addressed and healed (if possible) in the transition?

GBAT^o information:

Conflict Management Index
Comfort level with timing
Trust in the leadership

Engagement

How motivated are members to become engaged in transition tasks and how do we optimize their engagement? (There are a large number of potential tasks that I will not take the space to list here.)

GBAT^o information:

Indicated involvement
Indicated availability
Drivers of engagement

Financial planning

What are the projected expenses and revenue during the transition and how do we appropriately leverage financial resources in preparation for calling a new leader?

GBAT^o information:

Drivers of giving
Indicated transition giving

Risk management

What are the potential risks during the transition and how do we minimize their impact?

GBAT^o information:

Indicated reductions in availability or giving

Narrative generation

What are the important stories that need to be told and where do we look for them?

GBAT^o information:

Critical success factors

Critical strengths

Priorities for future by age, tenure, and level of involvement

Search Process

The purposes of a search process are to identify, call, and secure a commitment with the next, best leader for an organization through a process that is prayerful, respectful, efficient, and competent.

Organizational goals

What are the important goals for this body to become more vital and healthy that will require the engagement of a new leader?

GBAT^o information:

Critical success factors

Performance indices

Goals

Strategic goals

What are the important strategic goals for this body as it thinks about its future?

GBAT^o information:

External goals

Change in direction

Change in job description for new leader

Priorities for new leader

Information sharing

What body of information should be shared with the new leader to be a part of his/discernment process?

GBAT^o information

Performance indices

Member engagement

Trends

Critical success factors

Member profile

Start-up Plan

The purpose of a start-up plan is to optimize the long term effectiveness of a leader by identifying key tasks to be undertaken in the first three months of a new position to secure the good will of the membership.

Criteria for Success

What are the likely criteria that members will use in an initial evaluation of the new leader?

GBAT^o information:

- Drivers of satisfaction
- Critical success factors
- Indicators of flexibility

There are other important aspects of this plan that require conversation such as identifying islands of health, unique mission components, and asset transfer.