

# SUCCESSION PLANNING

Succession planning for the association Chief Staff Executive (CSE) position has become an increasingly visited topic of discussion. This should not be surprising, especially given the growing importance many trade and professional organizations can play in the industries and professions they serve.

The growing attention to succession planning appears to come largely on the trade association side, presumably reflecting the attention that the practice garners in the corporate suites of Fortune 1000 companies and beyond. Here, the identification and development of *internal* professional resources to fill key business leadership positions has become common practice. In fact, *HR – People and Strategy*, a Chicago-based professional society, has amongst its members corporate and consulting professionals whose principal focus is succession planning.

While the desire for succession planning in associations is understandable, there are differences between the association and corporate worlds that can affect significantly the practicability of transferring the practice. First among these is size of staff. By its very nature, succession planning involves an internal executive taking the CSE position of the group. However, well over half of the national trade and professional associations in the United States have staffs of 10 or less, with perhaps only 1 in 8 with more than 25. Such staff sizes are too limited in number to rely on for the development from within of the organization's next CSE.

Another factor affecting the practicality of succession planning in associations is the continuing rollover at the Board and Chair level. Given the diversity of corporate cultures and needs and the dynamics that can exist in an industry, one Chair's views on what is needed in an association's CSE may not be the next Chair's. There is also the fact that the issues facing an association may very well change, if not on a yearly basis than certainly over the period of time that would normally be encompassed in succession planning.

For these reasons and others, succession planning in an association context, certainly for those with staffs of say 25 or less, starts at the top, i.e., having a clear and shared idea among those on the Executive Committee as to the role of the CSE in the success of the organization. This involves the development of a Chief Staff Executive Profile. The Profile is composed of two sections: *Organization* and *Executive*.

The *Organization* section is a review of the association's status and dynamics, i.e., where it has been, where it is now and where it is headed. Also considered are its resources, its products, service areas and staff, among others. The second section, *the Executive*, reflects Executive Committee and staff input as to the skills, experience, characteristics and qualities needed to serve in the position. The *Executive* section closes with a specification of ten key areas of strength needed in the CSE position, organized in order of priority.

*Prepared 18 to 24 months prior to the intended date of succession, the Profile allows the Executive Committee to come to consensus on those strength areas needed to succeed in the position. With these in hand, it can:*

*Examine who among existing staff might be considered to succeed the departing executive and take appropriate steps to develop one or more as candidates.*

*Review the strengths of those reporting directly to the CSE in the light of CSE's departure and consider what adjustments might be indicated in staff capabilities.*

*Review the organizational structure/chart as to what functions may be combined, eliminated or expanded as the organization moves toward new executive leadership.*

*For the medium and smaller sized association, the focus in succession planning is not necessarily on an executive being groomed and brought up, but rather the succession of the organization through the process of transitioning from one Chief Staff Executive to the next. For the volunteer leadership, this process is an opportunity to look at the organization apart from the person who has been running it, no matter how successfully. In fact, the more successful the executive has been, more important it is to understand why he or she has been so successful.*