

Avoiding Burnout: Succession Planning for Friends Organizations

Idea Workshop

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"...a world without wild things would be no world at all..."

--Aldo Leopold

Session Goals

- Understand what Succession Planning is
- Assess when Succession Planning may be helpful or needed
- Discuss steps that may be taken to introduce or improve Succession Planning processes
- Understand what others have done that works (and what doesn't)

Overview

- What is Succession Planning?
- Why Succession Planning?
- Assessing the need
- Steps to success
 - A few ideas to get you started.
- Overcoming obstacles
- Discussion

Succession Planning

- Planned continuity

“Planning within an organization to ensure continued effectiveness as conditions change.”

Focus on People and Process

- The identification and cultivation of talented, creative, and dedicated people who can contribute to the long term success of the organization.
- The capture and documentation of vital knowledge, processes, and information that the organization depends on.
 - Dissemination of this knowledge to others.

One Tool Among Many

- Mission Statements and Work Plans
- Outreach, Education, Volunteer Recruitment, and Membership Development Programs
- Field Work Projects
- Communication strategies
- Effective networking within the community and with other Friends Groups
- Fund raising
- Succession Planning Strategies

Why Succession Planning?

- Organizations mature
 - Change of focus or mission
 - New opportunities arise
- Need to balance talent and work effort
 - Skills and good old fashioned ‘know-how’
 - Resources
 - Connections
- New ideas wanted or needed
- “Life happens.”

Assessing the Need

- Ask these questions:

How many people in the organization are the real “go-to” people for guidance or answers to particular questions?

What would happen if key leaders moved on? How would the organization fare in their absence?

Who would pick up the slack? *How* would they pick up the slack?

If you aren't comfortable with your answers to these questions, you might want to consider making Succession Planning a part of your planning process.

With Succession Planning:

- An organization has a “reservoir” of talented people who can step up and be effective when needed.
- An organization is:
 - Built around well-documented processes
 - Better prepared to ride out tough times
 - Better adapted to new and diverse challenges
(Folks appreciate opportunities to learn new things.)
- And is better able:
 - To attract fresh talent (It’s easier to do in a dynamic and vibrant organization.)
 - Deal with Burnout

Getting Started: Some Basic Ideas

- Keep your eye out for talented new individuals within and outside your organization.
- Identify important current and planned processes, activities, and programs.
- “Objectify” or embed those processes in your organization’s structure.
- *Value individual contributions and build process around them.*

This cannot be stressed enough!

Concrete Steps: Your Mission

- Create a Clear Mission Statement if you don't have one
 - Revisit your Mission Statement if you haven't done so in a while
- Align your processes, programs, and projects with your Mission Statement
 - In each case, ask: How do they support your organization's goals, the refuges you support, and the goals of the FWS?
- Questions to ask
 - How are your members and the surrounding communities served?
 - How are funds raised?
 - What outreach programs need to be created or enhanced?
 - How are training and field work projects handled?
 - Who are the “up and comers” you can involve?

Concrete Steps: The Board

- Examine the talent mix of your Board Members
- Align this talent with your Mission Statement
 - Review openly and honestly what each member of the Board brings that helps advance the mission.
(Admittedly, this can be very hard to do!)
- Make the hard decisions
 - Don't be afraid to change the makeup of the Board when changing circumstances require it.
(Yes, this can be even harder!)

Concrete Steps: Processes

- Basically, who does what and how do they do it?
- Are internal processes documented or otherwise made clear?
 - Communication
 - Event notification via Newspapers, Local TV and Radio, Your website
 - Event planning
 - Work parties, trail maintenance, invasive species removal, educational events, fun happenings, etc.

Involving Volunteers

- Be vigilant about identifying new talent and new ideas
- Speak with your volunteers about their ideas, goals, and suggestions about process improvement
- Consider having volunteers help by working with experienced and knowledgeable staff to document processes

And More Steps...

- Foster an organizational culture of change
- Cultivate the habit of documenting what you do
- Get everyone on the Board on board
 - Implement processes that help ensure that everyone understands his or her role in clarifying how they go about making their own contributions
 - Contact lists, Connections, and Networks
 - “Inside knowledge” (e.g. funding sources)

(Not So) Final Steps

- Let leaders lead
 - Not all leaders in your organization will be Board Members
 - (Well, maybe not yet.)
 - Cultivate them!
- Celebrate your successes and those who succeed!
 - Recognize the achievements of all who contribute to your goals.

Those Pesky Obstacles

- Ideas and attitudes
 - “That’ll never work here.”
 - “You don’t understand...”
 - “Everything’s just fine as it is.”
 - “That’s my job!”
 - “What’ll I do if I don’t do that?”
 - “Nobody can do it like I do it.”
 - “If I don’t do it, it won’t get done.”
- Inertia...

Are You Ready?

- What's SWOT?
 - Strengths
 - Weaknesses
 - Opportunities
 - Threats
- SWOTs should be:
 - Part of your Periodic Planning
 - Used as a tool for aligning your activities with your Mission Statement

Discussion

- What have you done?
- What works or did work for you?
- What didn't work and why?
- What would you do differently?
- What would you recommend?
- Other ideas??

Thank you!