Succession Planning: Beyond Theory

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“In theory there is no difference between theory and practice. In practice there is.”

Back in 2010, I was invited to speak at ACLEA’s 46th Annual Meeting in New York on the topic of succession planning. My presentation drew almost exclusively on my undergraduate degree in business, experience teaching organizational theory and behavior, and my own reading on the subject. Over the past 4 years, however, I have been living and breathing succession planning for an organization in transition. Most notably, I have managed over a dozen employee transitions, as well as surviving my own transition into the role of Executive Director. These experiences provided many opportunities to put succession planning theory into practice.

This paper provides a recap of succession planning best practices. For each of the recommended steps, I have also included a “how it works in practice” section that highlights some practical insights gleaned from my own experiences in the continuing legal education context.

There isn’t a “one-size-fits-all” approach to succession planning that works in every instance; every organization has its unique issues and context. This paper is intended to provide a solid foundation for any organization contemplating succession issues. It is also intended to put forward some applied solutions to real succession problems that continuing legal education organizations may face.
WHY SUCCESSION PLANNING?

Succession planning provides for the long-term sustainability of an organization. It also ensures that employees with an interest in—and the potential for—key positions are provided with appropriate development opportunities. This helps to satisfy employees’ personal career objectives, as well as organizational needs.

Succession planning plays a critical role in dealing with departures. It also helps address skills shortages, improve diversity, and foster employee engagement.

- **Departures.** Employees are bound to leave through departures or retirement. An organization needs candidates who are qualified for key roles when positions become vacant. Not only does an organization lose skills when an employee departs, but it also loses valuable organizational knowledge. Succession planning not only helps to ensure that there are candidates willing and able to step into the role of a departing employee, but also helps support strategies for knowledge transfer before a departure occurs.

- **Existing Gaps.** The exercise of succession planning can be useful in helping reveal gaps in required skills and competencies; identifying these shortfalls is the first step in addressing them. It can also be used as a tool to help improve diversity and to meet employment equity goals.

- **Employee Engagement.** Effective succession planning, when properly implemented, helps to retain skilled talent by providing employees with new challenges and opportunities to progress. Employees who are being groomed for higher level roles tend to be more committed, harder-working, and more likely to take pride in their work.

Getting the most out of succession planning requires an integrated, strategic approach.

**Takeaway:** Succession planning is about more than dealing with vacancies. It is also about ensuring an organization has the talent it needs and that existing employees are fully engaged.
THE GENERAL APPROACH

The traditional approach to succession planning focuses primarily on dealing with immediate or impending departures. In many cases, any advance “replacement planning” is focused exclusively on senior positions. The typical approach involves identifying one or two potential successors, often based on feedback from the candidate’s immediate supervisor. While this approach is common, it can result in missed opportunities for the organization.

Ideally, an organization takes a more strategic, leadership approach to succession planning. This involves developing pools of talent at various levels of the organization, as well as taking a longer term approach to development. Succession plans ought to be linked to competencies and potential for both current and future business needs. Processes should integrate succession planning with other human resource activities, such as learning, development, and recruitment.

Takeaway: While effective succession planning may look different organization-to-organization, it should invariably consist of more than simply identifying a list of potential successors to senior staff.

HOW IT WORKS IN PRACTICE

After working through more than a dozen recent transitions, I am more convinced than ever that succession planning is an invaluable investment. Ideally, it forms part of an integrated strategy for identifying, developing, and retaining talent. Such a strategy takes time, energy, and commitment to devise and implement. While just creating a succession “plan” may be fairly simple, I found the real benefit came from the planning exercise—and from the related activities we engaged in as a result.

STEP 1: UNDERSTAND STRATEGIC DIRECTION

A strategic approach to succession planning starts with understanding an organization’s strategic direction. Begin with the fundamentals: mission, vision, and core values. Analyze strengths, weaknesses, opportunities, and threats to understand the organization and the environment. Use this knowledge to pinpoint a competitive advantage. A solid foundation in these areas enables a clear grasp of the organization’s strategic direction, goals and, ultimately, day-to-day activities.
Once comfortable with these basic elements, assess the current state of succession planning in the organization. How is it currently done, if at all? How could it be improved? Is it integrated with other areas? Who needs to be involved in succession planning going forward? Who needs to be on board to effect meaningful change?

**Takeaway:** If an organization doesn’t know where it’s going, it may be tempted to pick successors who would have succeeded several years ago, but may not be equipped to handle the future.

**HOW IT WORKS IN PRACTICE**

I’m a firm believer that everything starts with a rock-solid understanding of what an organization is really trying to accomplish and how it intends to do this. This affects every decision an organization makes, including human resource decisions. So many aspects of succession planning would have been far more difficult for us if we weren’t crystal clear on our mission, vision, values, and goals. Investing some time upfront to ensure a strong foundation saves time and energy down the road, as well as results in a better end-product.

**STEP 2: EMBRACE A COMPETENCY/POTENTIAL APPROACH**

In identifying possible candidates for a position, people often focus on a number of years of experience, specific education, or successes; these have limited ability to predict future performance. Start by identifying the competencies or potential needed to realize the organization’s vision and pinpoint what is required for each key position.

Competencies refer to the qualifications to perform certain roles; these may include certain knowledge (body of information), skill (proficiency in performing a task), or ability (enduring trait or capability). Examples of competencies include command skills, interpersonal skills, political savvy, project management skills, and strategic agility. Using the organization’s mission, vision, and values as a guide, identify core competencies required of employees.

Focus on key areas or positions, namely those that exert critical influence on the organization’s ability to deliver on its business objectives. Ask: Which positions, if left vacant, would seriously jeopardize the organization’s ability to meet current or future
business goals? It is critical to understand the capabilities required for successful performance in these key positions.

To develop competency profiles, review job descriptions and interview people currently in the role, as well as other stakeholders. Competency profiles are valuable for succession planning, but they can also be helpful in integrating various human resources activities (e.g. succession planning, recruitment, learning and development, performance evaluation) across a common framework.

An emerging perspective is that 21st century operations are becoming too complex for even a competency-based approach; proponents of this notion favor a focus on potential. The thinking is that managers should assess current and prospective employees on a combination of motivation, curiosity, insight, engagement, and determination (see Fernández-Aráoz. “21st Century Talent Spotting.” June 2014, pp. 46-56. Harvard Business Review).

**Takeaway:** Knowing what competencies or potential a role demands makes it easier to assess candidates (whether internal or external) and to help them develop in critical areas.

**HOW IT WORKS IN PRACTICE**

_We invested a fair amount of time in developing competency profiles for the positions in our organization—and this was time well-spent! This work can be used for a range of purposes. We use our profiles to assist us in the hiring process, to help identify development opportunities for staff, and as a way to measure performance._

_There are some great resources available to help get you started. I recommend a book called the Career Architect® Development Planner by M. Lombardo and R. Eichinger, published by Lominger International. It identifies relevant competencies, provides information on how to assess them, and suggests learning plans to help individuals develop them. For a freely available alternative resource (based on the same research, but adapted for the education sector), visit Microsoft in Education at [http://www.microsoft.com/education/ww/Training/Competencies/Pages/default.aspx](http://www.microsoft.com/education/ww/Training/Competencies/Pages/default.aspx). I’ve also attached as an Appendix the list of core competencies we selected for our staff. There are some competencies (like “Integrity and Trust”) that are common to all positions; other competencies are specific to the type of position._
My advice is not to get hung up on ensuring that your competency profiles are perfect. While it is important to have a usable end-product that highlights major competencies, you don’t need to capture everything. As your organization evolves, you can expect to make changes to your competency profiles as well.

**STEP 3: IDENTIFY AND ASSESS CANDIDATES**

Once competency profiles are in place for key positions in an organization, identify the people inside the organization who have (or can acquire) these competencies. Compile a list of those people in the organization who have an interest in career advancement or a possible lateral move. If appropriate given the size of the organization, consider administering surveys, tracking career interests in a database, or even having people apply for a formal development program. Organizations of all sizes should encourage career discussions between managers and staff.

Once possible candidates have been identified, there are a variety of tools that can be used to assess their potential. In assessing candidates, many organizations rely only on feedback from an immediate supervisor. To get a more complete picture and to minimize subjectivity, consider building in a systematic process for assessing candidates based on an array of perspectives and information sources. Performance reviews, 360 degree feedback, interviews, in-basket exercises, psychometric questionnaires, or examinations (written, oral, or roleplaying/simulation) are options.

In choosing appropriate mechanisms, bear in mind the type of position in question, available resources, and the culture of the organization. The culmination of this assessment often results in an employee profile which typically includes performance ratings, career plans and interests, and competency strengths and vulnerabilities. This profile can then be compared against the competency profiles for key positions (see Step 2).

Once employees have been identified and assessed against the competencies or potential needed to succeed in key positions, tailor development opportunities accordingly.

If the assessment reveals that the organization lacks prospective candidates for key roles, be prepared to recruit externally using the core competencies or potential as a guide to inform both job postings and the screening/interview process.
Takeaway: By identifying and assessing employees against what is required for key positions, development opportunities can be clearly highlighted (or appropriate external recruits can be sought).

HOW IT WORKS IN PRACTICE

While this is a sound recommendation in theory, this step proved very challenging for our particular organization. We are relatively small, with diverse offerings, and we run incredibly lean. Over a very short period, we also faced a whole number of simultaneous retirements and parental leaves. In addition, many of our new hires have been of the new generation—which tends to be highly mobile. Together, these factors resulted in some notable human resource gaps. This meant that we haven’t had the kind of internal “bench strength” that would be ideal. As a result, for many of our key positions (particularly at the senior levels), there were simply no potential internal successors. This meant we had to think creatively.

Knowing we were going to need external hires factored into our succession planning, we developed a close relationship with a company that provides both recruitment and temporary staffing solutions. We helped to educate them on our organization, our culture, and our philosophy. We also explained our competency model to them. They appreciated that working with us wasn’t about matching job descriptions to résumés; it was about sourcing competencies to match our needs. Through this process, we have found some amazing candidates with unexpected backgrounds (everything from classical archeology to music management!).

In addition, we began implementing a “trusted contractor” model as a means of cultivating potential successors outside the organization. These “trusted contractors” are individuals we hire on project-specific basis. In working with them, we try to educate them about our mission, vision, core values, and strategic goals. Many of these individuals are lawyers who are in transition (having families, preparing for retirement, contemplating career changes, etc.).

When we have a human resource gap that we can’t fill internally, the first place we look is to our pool of trusted contractors. This is a valuable source of potential candidates for both interim and longer term positions. Because we’ve worked together previously, we already have a sense of the competencies and potential they possess and how they fit with the organization. This approach significantly reduces the on-boarding time for positions that would otherwise have had a tremendously
steep learning curve. This is also allowing us to expand the diversity of our talent pool, enabling us to tap into new competencies that we may not have within the organization. When engaging in the “identify and assess candidates” step, we can now look to this expanded pool of individuals.

STEP 4: DEVELOP POTENTIAL SUCCESSORS

Once candidates have been identified and assessed, encourage them to develop the competencies they need for future roles. Urge all employees to have learning plans and to participate in development opportunities. Be transparent about the succession planning process but manage employee expectations to avoid the perception that promotions are guaranteed.

Where employees have shown an interest in—and demonstrated potential for—career advancement, development opportunities ought to focus on the competencies required for such advancement. The identification and assessment exercise (see Step 3) provides the roadmap for this learning development. Development opportunities may include formal training courses (in-person or online). Training, however, is only one aspect of learning development. Exposure to, and experience in, different areas is critical to preparing candidates for new roles.

To allow employees to acquire experience in different disciplines or functions, consider exposing them to different aspects of your organization through a job rotation. To encourage employees to expand their current abilities, provide them with challenging “stretch” assignments (e.g., leading a special project). To give employees experience at a more senior level, allow them to temporarily take over another employee’s duties while they are away (e.g., as “acting” manager). Don’t discount either formal or informal mentoring or coaching, which can also be valuable.

Takeaway: By providing candidates with targeted exposure, training, or experience, you can help them develop competencies required to assume more senior or alternative roles.

HOW IT WORKS IN PRACTICE

One of the challenges inherent in what we do is the steep learning curve that individuals face coming into our organization. While new hires come in with valuable competencies and potential, they are invariably new to the world of continuing legal
education. While this is a challenge, it is also a great opportunity. Continuing legal education is an exciting mix of publishing, event planning, project management, communications, law, and adult education. This means that there is no shortage of interesting learning opportunities for staff. We try to capitalize on this.

Research shows that a key factor in employee retention and engagement is a sense of growth and development. While we still do annual performance reviews, the focus of our review process has shifted towards development plans. In conjunction with their review, employees seek feedback from others and complete a self-assessment. The goal of this exercise is to create a development plan for the upcoming year.

The development plans highlight competencies that employees will work to build in the upcoming year. These competencies are designed to give them greater confidence or comfort in carrying out current responsibilities or to help them prepare for future roles. In identifying activities to support competency development, we focus on the three “Es”: education, exposure, and experience.

Sometimes, we schedule formal learning opportunities ("education"), such as onsite training or having employees attend conferences (like ACLEA!). Other times, we look for opportunities to have employees work alongside someone else in the organization who has already mastered that competency ("exposure"). As well, we try to identify low-risk opportunities for an employee to practice a particular skill ("experience") either by working on internal-facing projects or by volunteering through other organizations (like ACLEA!). We also have a highly experienced executive coach who works with individuals on developing some of the more complex and nuanced competencies (e.g., conflict resolution, delegation, political savvy).

Finally, we use every employee departure as an opportunity for a fresh look at our organizational chart and individual staff roles. We have several employees in the organization who have occupied multiple different roles in the organization at one time or another. This provides staff with opportunities to learn and grow and tackle new things (which helps stave off boredom!). It also helps build strength within our organization – people work together better when they have a broader understanding of the organization as a whole. We also benefit from new perspectives. This approach helps to mitigate the risk when an employee leaves—we have multiple people who are comfortable filling that role on an interim (if not longer-term) basis.
STEP 5: MANAGE KNOWLEDGE TRANSFER

A successful transition into a new role requires the candidate to have specific abilities, but it also requires certain knowledge. Explicit knowledge can be tracked and documented in records and manuals; transfer of tacit knowledge (e.g. know-how, judgment) requires interpersonal interaction.

Attempts to manage and retain both types of knowledge are important. The development process (see Step 4) helps manage some knowledge transfer, but there are other steps to encourage a departing employee to share knowledge before leaving.

For critical knowledge that can be documented, encourage employees to keep a record. Answers to frequently asked questions, key contact information, best practices, and important procedures can be useful to pass along to an incoming candidate. To facilitate tacit knowledge transfer, provide opportunities for junior employees to work alongside more senior ones. For employees who are leaving the organization, provide an exit interview opportunity, which can also be used to capture critical information.

Knowledge transfer may take time; ensure that an employee who is nearing the end of his or her career has sufficient time to mentor and share information with others. Also consider your organization’s pre-retirement options and support. Some organizations offer employees nearing retirement an optional pre-retirement transition period during which the employee can work reduced hours. This operates as a retention strategy and allows more time for knowledge transfer to occur.

**Takeaway:** Effective succession management is not just about identifying appropriate candidates and helping to develop their capabilities; it also means facilitating the transfer of both explicit and tacit knowledge from departing employees to incoming ones.

HOW IT WORKS IN PRACTICE

Strategies for managing knowledge transfer really depend on the specific situation. Sometimes, you have ample time for knowledge transfer to occur. For example, in my transition into the Executive Director role, I had four years as Managing Director, followed by a full-year transition with a well-documented transition plan, followed by six months where my predecessor was available to me in a consulting role. Sometimes, however, you have no advance warning at all of a transition.
If you have the benefit of time in preparing to manage knowledge transfer, I recommend the following:

- Start by achieving consensus on what needs to be transitioned. Be specific, including clear outcomes. Something like “hand off external relations” won’t work; creating a list of key contacts, identifying opportunities for introductions, scheduling transition lunches or meetings, etc. will.

- Document the plan. This helps hold everyone accountable, especially if the departing employee feels a sudden reluctance to hand things off.

- Prioritize transition items; if time starts running short, everyone will know where to focus their efforts.

- Create a transition schedule, being mindful of time-sensitive items. For example, some activities only happen once a year. Don’t miss out on a valuable transition opportunity because you failed to schedule it.

- Ensure that someone with authority is overseeing the transition; he or she should regularly review the progress on the transition plan.

Not all successions involve a departing employee who is ready and willing to let go. I’ve found this process can still work, but it requires more active participation and oversight from a third party (someone other than the successor and incoming employee). Once a transition plan is created (ideally a collaborative effort, but sometimes dictated), it sets clear expectations for everyone involved.

As you create a transition plan, you want to balance the interests of the organization, the person who is leaving, and the successor. If the transition is occurring due to a retirement or a leave of absence, consider a staged process. This can help the departing individual (as well as the organization) ease into this new chapter. Ask yourself whether it would be appropriate to retain the individual in another capacity once they’ve left their current role. While you want to provide the successor with full autonomy, there may still be opportunities for the departing employee to share their knowledge and expertise in a way that benefits everyone. We’ve had success with this with all levels of staff.

You will not always have the benefit of advance warning of a transition. My advice is to remember that any employee could depart at any moment. For every role, there should be documented procedures, frequently asked questions, templates, and
checklists. Cross-functional training is also important. For every role, there should be at least one other person in the organization who knows enough about what that role entails to fill it on an emergency basis or to easily train a replacement.

**STEP 6: EVALUATE**

To keep your succession planning efforts on track, there are several keys measures of which you should be aware. Establish a baseline and then monitor your success with regard to the following:

1. **Vacancies.** Track the number of vacancies in your organization as a percentage of total positions, as well as the average time it takes to fill them. Effective succession planning should result in fewer vacancies at any given time, and a decrease in the time to fill them.

2. **External/internal hire ratios.** For key positions, calculate the number of external hires over a given period, versus the number of positions filled internally. Effective succession planning should enable you to fill a higher number of key positions from within.

3. **Bench strength.** “Bench strength” represents the ratio of key positions with no internal replacement to the total number of key positions. Effective succession planning should maximize the number of internal replacements available for all key positions.

4. **Performance ratings.** Monitor the performance ratings of employees who are new to key positions. Effective succession planning should enable employees to meet performance targets early into starting a new position.

5. **Employee engagement.** Use satisfaction surveys and rates of turnover as a general check on organizational health. Ask questions specific to succession planning or the developmental process to illuminate the employee perspective.

These indicators should enable you to monitor the success of your succession planning initiatives, and to make adjustments where necessary.
Takeaway: By evaluating and monitoring certain key indicators, you can gauge the success of your succession planning efforts and adjust accordingly.

HOW IT WORKS IN PRACTICE

In my own organization, we use some (but not all) of these metrics. I can say that, overall, our focus on an integrated strategy to identify, develop, and retain talent has had immensely positive effects on the organization.

Since adopting these succession planning techniques, we haven’t yet experienced a significant overall decrease in vacancies. That said, we now almost never lose employees to another job. When we have a vacancy now, it is almost always because of a significant change in an employee’s life (e.g. retirement, kids, medical issues) or because we think it is time for an employee to move on. When vacancies do occur, it is never the panic that it once was.

We don’t track external/internal hire ratios. While effective succession planning should enable an organization to fill more positions from within, we aren’t often able to do this. Most of our recent hires, however, have come through our recruiter or our “trusted contractor” pipeline. This has enabled us to find better fits in a shorter period of time than by hiring purely “external” people. So while our technical “bench strength” remains lower than optimal, we have achieved improved outcomes by building relationships with our recruiter and trusted contractors.

We have significantly reduced the time it takes for new hires to get fully up to speed. Because we have more practice at onboarding, better documentation for new people coming into a role, and more people in the organization who understand each role (due, in large part, to our cross-functional training), new employees are able to hit performance expectations much sooner than before.

We do regularly administer employee engagement surveys. Employee engagement in our organization has increased significantly due, at least in part, to some of these initiatives.
“Plans are useless, but planning is invaluable.”

Gone are the days of “cradle to grave” employment; today’s workforce is increasingly mobile. On top of that, continuing legal education is a multi-disciplinary practice that demands an array of competencies. It can be expensive and time-consuming to invest in training up new hires, only to have them leave. For those in the not-for-profit sector, there can be added constraints – top salaries and bonuses are simply not incentives many of us can provide.

Effective succession planning and management should be part of an integrated system for identifying, developing, and retaining talent in key areas. I see this as a top priority for human resource professionals and executive leadership alike.

Succession planning is about more than dealing with vacancies. It is about ensuring an organization has the talent it needs and that existing employees are fully engaged. It starts with a clear strategic vision, so that employees are prepared to handle the future, not just the past. It means gaining a clear handle on what competencies or potential an organization requires (not just focusing on specific education or work experience). It means helping to identify competency gaps and either building those needed competencies internally or hiring them from outside.

Done effectively, succession planning and development will benefit your employees, make your organization a more competitive employer, improve retention and engagement, and help to preserve valuable organizational knowledge. While CLE organizations face some unique challenges, our competitive strength in learning and development positions us extremely well to succeed using this approach.

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All staff members, regardless of position or seniority, should possess the following competencies:

**Integrity and Trust.** Employees should be viewed as trustworthy individuals within the legal community and should also work to establish trust with others in the organization. Admission of one’s mistakes and taking credit for one’s actions is an indication of trustworthiness as well as integrity.

**Interpersonal Savvy.** Employees should be capable of strategically building an appropriate rapport with a range of individuals, including employees, volunteers, contractors, students, and other stakeholders. Employees should be approachable, diplomatic, and able to put others at ease.

**Functional/Technical Learning.** Employees should demonstrate the ability and willingness to develop functional knowledge and skills, as well as be able to learn and adapt to new technology and processes.

**Personal Learning and Development.** Employees should be personally committed to and actively work to continuously improve themselves. They should recognize the need to change and grow, actively seeking feedback to help them do so.

**Stakeholder Focus.** Employees should commit to meeting the expectations and requirements of internal and external stakeholders. They should act with stakeholders in mind and value the importance of providing high-quality service.

In addition to the competencies listed above, senior staff members should possess the following:

**Functional/Technical Skills.** Senior staff members should possess required functional and technical knowledge and skills to do their jobs at a high level of accomplishment. They should demonstrate active interest and ability to enhance and apply new functional skills in their areas of expertise.

**Project/Process Management Skills.** Senior staff members should be skilled at efficiently managing tasks and workflow, with an aptitude for understanding the steps and processes required to achieve an objective. Organization, prioritization, and delegation are all essential skills.

In addition to the competencies listed above, those in a supervisory role should possess the following:

**Building Effective Teams.** Team leaders should be skilled at building cohesive teams of people within the organization. They should be able to guide teams to establish and achieve goals, collectively sharing in wins and successes so that each team member feels valued.
Directing Others. Those in a supervisory capacity should be able to establish clear directions and assign responsibilities that bring out the best work from people. They should establish good work plans and distribute workloads appropriately.

Developing Others. Those in a supervisory capacity should be able to construct compelling development plans and to execute them. They should be able to provide challenging and stretching tasks and assignments to help people learn and grow.

In addition to the competencies listed above, Associate Directors should possess the following.

Motivating Others. Associate Directors should be skilled at creating a climate in which people want to do their best, empowering others, and inviting input from others. People should like working for and with the Associate Director and should feel that the work they do is important.

Political Savvy. Associate Directors should be skilled at using diplomacy and tact to diffuse complex political situations. They should be sensitive to the diversity of the organization’s employees, volunteers, contractors, students, and other stakeholders.

Managing and Measuring Work. Associate Directors should be skilled at clearly assigning responsibility for decision-making, setting clear objectives and measures, and monitoring processes, progress, and results.

In addition to the competencies above, the Executive Director should possess the following.

Board Management. The Executive Director should be skilled at dealing comfortably with the Board of Directors, presenting to them without undue tension, and developing approaches seen as appropriate and positive.

Strategic Agility. The Executive Director should be skilled at accurately anticipating future consequences and trends, creating competitive and breakthrough strategies and plans, and articulating visions of possibilities and likelihoods.

Vision and Purpose. The Executive Director should be skilled at communicating a compelling and inspired vision or sense of core purpose and at inspiring groups of people. The Executive Director should be optimistic and should create symbols to rally support behind the vision.