



Preparing your community organisation for the future

A guide to succession planning



In summary:

Board succession:

- Consider the ideal size for your board to achieve the best mix of skills and experience.
- Assess your current board on its make-up, levels of engagement, skills, and experience.
- Address any current problems with the board before recruiting new members.
- Consider who you are targeting, where to find good candidates locally, and how you can best induct new board members.
- Think of creative ways to engage young people in your organisations to serve as potential future board members.
- Be realistic about practical barriers which may prevent people from joining the board - offer a range of ways to get involved.
- Think about retention as well - how will you manage meetings to ensure that new board members are fully involved?

CEO succession:

- Consider which attributes you identify as essential, and which are desirable. Unnecessary essential criteria may create a barrier to applying for many.
- Remember - you recruiting to the position, not replacing the person. There are many ways to deliver the role and no "perfect" candidate.
- Benchmark the salary you are planning to offer against the market.
- Discuss with your staff all the good things about working for your organisation and promote these as part of the recruitment campaign.
- Ensure that someone from the board (usually the chair) has regular one-to-one support and supervision sessions with the CEO.
- Use a wide variety of channels to advertise your vacancy.
- Make the role and application process as easy to understand as possible.
- Ensure there is a clear, sustainable, and appropriate hand-over process from the outgoing CEO to the new one - particularly where there are ongoing problems to be addressed.
- Evaluate the recruitment process for the future.

Succession planning for boards and staff is an issue for many community organisations. Our research, '[Navigating the storm](#)', identified that the Covid-19 pandemic has exacerbated existing problems.

Organisations commented on the dedication of board members, staff, and volunteers at a time of national crisis. But lockdown was also a time when many people reassessed their lives and are now signalling their intention to move on from work roles and board positions.

Board succession

By board, we mean the directors or trustees of your organisation. Recruitment to the board is straightforward in theory. In line with your governing document, you may recruit from a broad community membership, advertise and/or approach people to join the board. In practice, recruiting to the board can be much more difficult. Whilst there are a range of challenges, members tell us that the main problem is finding enough people willing to consider joining their board.

Assessment

A good starting point is considering the ideal size for your board. Many community organisations end up with board size determined by the number of people they can recruit. Ideally what would be the right size for your board? What is the right mix of skills and experience?

Our suggested next step is to assess the current board. Have you got enough members? If you lost two or three active members, would the board still be able to function? Do you have a good mix of skills and experience? Are all board members actively engaged? How do current members view board meetings - as constructive, interesting, and meaningful, or as boring and a real

chore? Be honest but respectful. If there are problems with board meetings, perhaps these need to be sorted out before you start to recruit.

If you have nominations to your board from the council or local organisations, how is that working? Do nominees have the skills, experience and commitment needed? Do you have a role in scoping out your requirements to the nominating organisation?

Many governance codes include an annual review of board effectiveness. This is an opportunity for the board to reflect on what works well and what could be improved. The pandemic has put a hold on many of these meetings, with an agreement to wait to meet face to face. It may be difficult to make time for these sessions, but they can be hugely valuable.

Immediate issues

If you are short of board members now or will be soon, you could try:

- using personal contacts to talk with people who might get involved.
- targeting people with key skills - perhaps there are local businesses who would support an employee to volunteer.
- talking to partner organisations who may have staff or volunteers keen to acquire skills and experience.
- offering information, support, and/or buddying as part of the induction for new members.
- asking why people have turned you down in the past to help to shape your future approach.

Once you have recruited, keep succession on the agenda. Make the changes now that will make future recruitment easier.

Planning for the future

The baseline for any engagement is information. Do community members and those who use your services know how the organisation is governed? What methods do you use to get that information across? It can be helpful to emphasise a give-get relationship, saying clearly what you offer and what you need. Many people say they don't get involved because they have not been asked.

Include recruiting to board as part of your community engagement strategy. That strategy aims to ensure that you are reaching all sections of your community, including those who do not use your services or visit your building. Check whether one of the causes of a board recruitment problem is that the organisation only works with part of its local community. If this is the case, think about the best way to reach the under-represented sections of the community.

A key issue raised by members is getting younger people involved. Older community stalwarts have done an excellent job in keeping the organisation running over the years, but they want the option to retire. Look at creative ways to do this – they will vary between organisations. Options could include arts projects, activities focused on families, outreach with schools and colleges, and highlighting the specific advantages of getting involved for people at the start of their career. These include experience of management and having fellow board members who can supply a reference.

Whilst you need to be open and fair, not everyone will be able to join the board. But it can be useful to think about who might be receptive:

- As discussed above, young people seeking experience and employment related skills.
- Parents and carers with young children looking to learn new skills and make new friends.
- People approaching retirement who may be considering their post-work life.
- Professionals living or working in your community who may be looking to broaden their CV.

It can be helpful to offer a range of ways to get involved. You could set up a young people's board or a shadow board so that new people can get experience. You could set up short-term working groups involving some current board members and potential new recruits to look at a key issue and report to the board. You could start with volunteering opportunities then start to sound out volunteers about joining the board.

Be honest about assumptions and practical barriers which may hinder recruitment. Practical barriers may exist around the timings of meetings and how they are conducted. Would changing the time or day of board meetings help with recruitment? Could you offer help with childcare or other costs? If you have very formal meetings, link new people up with a mentor so that they understand how they work. Not everyone is familiar with meeting etiquette – feeling that they have somehow got it wrong will demoralise new recruits. Question assumptions about why it is difficult to recruit – for example, people don't want the responsibility or people with children and/or demanding jobs don't have time. If your assumptions are inaccurate then you are narrowing your options unnecessarily.

It is not just recruitment, but retention. It can be difficult to be the new person joining a close-knit, established board. Think about how you will manage

meetings to ensure that new people are fully involved, that they can contribute and that their ideas are considered. New people will be disruptive, but that is not a bad thing.

Remember to have some fun. People will stay because they get something out of being on your board. Talk to existing members about what works for them, why they stay. Make sure there is time to welcome and get to know new members.

CEO succession

Our research highlighted an issue with long-standing, highly respected CEO's looking to move on, often to retire. Whilst this has always been a problem, the pandemic seems to have exacerbated the issue. Recruitment problems and staff shortages are a key feature of the aftermath of the pandemic, making dealing with this issue more difficult.

Many boards are faced with recruiting and retaining a new CEO, which means dealing with important and sometimes very sensitive questions about:

- job description and person specification
- salary and the wider benefits of the role
- attracting a broad range of candidates
- role of the outgoing CEO
- change in the organisation

Job description and person specification


However brilliant the CEO, it is unlikely that you will wish to recruit to the same job description and person specification, particularly if the CEO has been in post for several years. Focus on what you need to take the organisation forward. Consider which attributes you identify as essential, and which are desirable. You want to attract a good field of candidates.

Too many essential requirements may put applicants off from applying, even though they could do the job well. They may also disproportionately disadvantage people from racialised communities and disabled people.

It is useful to remember that you are recruiting to the position, not replacing the person. There are many ways to deliver the role and no "perfect" candidate. It is usually best practice to ensure the outgoing person does not have a direct decision-making role; people can be tempted to "recruit in their own image". As mentioned earlier, you should be looking at what you need to take the organisation forward. But an existing CEO may feel undermined by this approach, and it is important to provide support. See if it is possible to give them some sort of role – but just be clear about the decision-making lines.

Salary and the wider benefits of the role

It is important to benchmark the salary you are planning to offer against the market. In a competitive recruitment market, you will need to offer an attractive salary to secure a good field of applicants. Again, it will be a difficult conversation if you are planning to offer a higher salary than you pay to your current CEO. It may also upset staff who are loyal to the current CEO. For some organisations, adjusting the salary will not be possible due to financial constraints. Not being able to recruit will be a key risk for these organisations.

As noted in our research, salary is not the only driver. The opportunity to do meaningful work will be a key motivation for good candidates. The CEO will benefit from welfare measures you have put in place for your staff team – these could include anything from flexitime to yoga classes. Check out our ['Pathways to good work'](#)  toolkit. The good work agenda provides a distinctive position and competitive advantage in the labour market, where a decent wage can be accompanied by

mission-driven fulfilment and broader life benefits. Write down all the good things about working for your organisation (take soundings from the staff) and make sure you promote these as part of the recruitment campaign.

The pandemic has highlighted the stress on CEOs. Another key aspect of attracting good candidates will be the support offer for the CEO. Many organisations operate an effective line management system for everyone but the CEO. Ensure that someone from the board (this is usually the chair) has regular one-to-one support and supervision sessions with the CEO. This is particularly important during the first few months of an appointment to provide detailed information about the organisation, agree an approach to difficult issues and identify if there are problems with performance. Additionally, you could consider sourcing mentoring from outside the organisation where the new CEO can confidentially talk through difficult problems and let off steam.

Attracting a broad range of candidates

Use a wide variety of channels to advertise your vacancy. There are some excellent third-party agencies (e.g. WebRecruit) who can discuss your role and help put packages together for advertising depending on location and the type of organisation. They can also advise on social media. Using your own platforms such as Facebook and Twitter can be effective – especially where you encourage your network to resend information. LinkedIn has a range of options from simply pushing the role out to your network, through to active sourcing of candidates. Social media is a big part of recruitment, and you need to plan this in. You will know your local media best and you may find there are still some traditional forms of recruitment (e.g. local newspapers) that

are effective as an addition. Also think carefully about the equalities aspect of advertising to ensure the widest range of candidates.

As a general point you need to see recruitment as a marketing campaign; it's a tough market for employers to source good candidates and you need to convince people that you are a great organisation with lots to offer. You need to be honest and authentic but plan your campaign well. Ensure your website is up to date and that there is enough information for candidates to decide if they should apply.

If possible, it is helpful to have someone who can have a discussion with potential candidates. The CEO role in a community organisation can be difficult to understand if you are not from the sector. Many people in the private or public sectors will have the transferrable skills to do the job well, but will require more than a job description, person specification and your website to fully understand what is required.

Think carefully about how people apply. The current market is a jobseeker's market, so you need to make the process of applying straightforward. Try to avoid overly complex application forms. If using CVs, ensure this is backed up with some simple questions; it is usually best to make these scenario-based questions so you know how a candidate would react to a certain situation based on real life. Remember to ask questions about where the candidate saw the advert – this helps you track the best methods of advertising.

Role of the outgoing CEO

It is likely that the outgoing CEO will be involved in supporting the board in relation to the recruitment and appointment process. Once you have appointed, it is helpful to have a handover period if possible and

affordable. If a handover period is not possible, work with the outgoing CEO to ensure that all key information is documented, permissions handed over, etc.

We recommend a clear agreement with the outgoing CEO if they are to have any ongoing role with the organisation. Many organisations will be keen to retain links with the outgoing CEO for professional and personal reasons. However, it can be difficult for a new CEO to find their feet if the outgoing CEO is still around. If the outgoing CEO has a continuing link to your organisation, keep it under review and ensure the arrangement works well for your new CEO.

Change in the organisation

A new CEO is always going to create uncertainty within the organisation. Staff and volunteers may feel unsettled. Partnerships with key stakeholders have to be rebuilt. It is important that this is recognised by the board. It is helpful if the board has a higher profile during this time to provide continuity.

If your new CEO is inheriting problems, look at specific ways in which the board can provide support. Many new CEOs report arriving for their first day and being handed complaints, staff disciplinary issues, health and safety problems, notices of termination of a contract and expected to deal with them. On-going issues should not come as a surprise to your new employee and you should be ready to support them as they deal with the problems.

Evaluate

Following the recruitment process, take time to establish what went well and what did not work so well. For most organisations, recruitment of a CEO or other senior staff is a rare event, so it is useful to record and evaluate the process to inform future recruitments.