

Executive Director and/or Associate Director Succession Plan Policy and Procedure

Succession and/or transition planning for the Colorado Association of School Business Officials - the preparation to replace one leader with another - is a critical action for the association. Few events in the life of an association are as critical, visible, or stressful as a change in leadership. The eyes of every member, vendor and organization will be focused on the organization. How such an exit is managed reveals the character and effectiveness of that leader and association.

Leadership transition is an integral process that begins long before the outgoing leader departs, and it presents a remarkable opportunity to move forward with a new understanding of the complexities, challenges, and changes the organization must address.

Non-Profit organizations that are serious about their own sustainability will also be serious about planning for smooth and thoughtful transitions of leadership. Whether a transition occurs due to an unexpected vacancy on the staff or board, or the anticipated transition of a long-tenured leader, being ready with a plan in place can help a nonprofit weather the inevitable challenges of leadership transition.

Leadership Transition Outline

1. Gain the commitment of the board and staff to manage transition intentionally.
 - a. The Colorado ASBO Board shall establish a selection committee to oversee the transition of leadership.
 - b. The Selection Committee makes candidate recommendations to the Board for interviews, finalist and selection approval as appropriate.

2. Identify current challenges and those that lie ahead, and the corresponding leadership qualities that are needed to navigate the challenges successfully.
 - a. The Colorado ASBO Board shall review current and immediate future needs of the organization and establish distinguishing qualifications for the Executive Director and Associate Director positions. Qualifications to consider:
 - i. Executive Director:
 1. Knowledge of Colorado school finance and operations.
 2. Minimum of 10 years' experience as a Colorado School Business Official, or other experience as determined by the selection committee.

3. Minimum of an MA and/or sufficient experience and skills as determined by the selection committee.
 4. Proven written and verbal communication skills.
 - ii. Associate Director:
 1. Knowledge of Colorado school finance and operations.
 2. Minimum of 5 years' experience as a Colorado School Business Official.
3. Consider whether placing an interim leader at the helm is the right path for Colorado ASBO.
 - a. In the event of an untimely vacancy, the Colorado ASBO Board shall determine if an interim Executive Director or Associate Director shall be appointed. Interim term shall not exceed 12 months, unless otherwise approved by the Colorado ASBO Board.
4. Draft a timeline for leadership successions and/or transitions that are planned.
 - a. Once notice of resignation is received, the Board will develop a process and corresponding timelines for the candidate search and selection.
 - b. The timelines shall be followed to the extent possible but may be modified as determined necessary by the Board in order to accommodate certain issues or circumstances that may arise throughout the process.
5. Interview Process
 - a. Interview questions shall be developed by the Selection Committee with input from the Board and/or the Executive/Associate Director and legal counsel, as appropriate.
 - b. The interview committee as selected by the Colorado ASBO Board shall include a minimum of one Colorado ASBO past president and one member who is not a past president or past board member.
 - c. The interview committee shall make a recommendation for hire to the Colorado ASBO Board.
6. Create an Emergency Leadership Transition Plan to address the timely delegation of duties and authority when there is an unexpected transition or interruption in key leadership.
 - a. In the event of an untimely departure of the Executive Director, the Associate Director shall take over day to day responsibilities until such time as the Colorado ASBO Board determines if an interim shall fill the position.
 - i. Additional compensation during the interim period shall be determined by the Colorado ASBO Board.

- b. In the event of an untimely departure of the Associate Director, the Executive Director shall take over day to day responsibilities until such time as the Colorado ASBO Board determines if an interim shall fill the position.
- 7. Make plans to adequately support newly placed staff, such as coaching, mentoring, and defining goals.
 - a. The Colorado ASBO Board shall meet with new Executive/Associate Director and establish:
 - i. Mentor/mentee system with selected Colorado ASBO past presidents.
 - ii. Develop learning/outreach/understanding goals for a minimum of 12 months following appointment to the position.
 - iii. Establish annual goals thereafter that align with the organization's fiscal year and strategic plan.
- 8. Communications
 - a. The Colorado ASBO Board shall develop a communication plan to inform members of the change in leadership.
- 9. Compensation
 - a. Outgoing Executive/Associate Director shall be compensated based on their most recent contracted salary pro-rated until the date of final transition (see #4 above).
 - b. Incoming Executive/Associate Director shall begin their contract with Colorado ASBO by mutual agreement.
- 10. Closure
 - a. Publicly recognize outgoing Executive/Associate Director.

Resources:

Next in Line: Five Steps for Successful Succession Planning

By: Andre Mamprin, Banff Centre for Conferences
James Scharff, Ph.D., Former Executive Director, Iowa ASBO,
236 N.E. Pinehurst Circle, Ankeny, IA 50021

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