

## Learnings from Spring 2024 Organizational Capacity Building Workshops



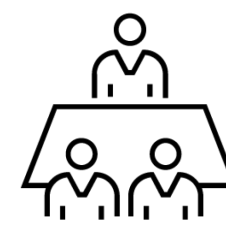
In addition to our grant-making, The Cullen Foundation of Western New York, Inc. supports its grantees in other ways, including hosting professional development workshops around **Organizational Capacity Building** topics driven by shared needs. In Q2 2024 we hosted three (3) workshops in partnership with **New York Council of Nonprofits, Inc. (NYCON)**. Attended by 79 individuals, representing staff and Boards of **30+** grantees, one of the workshops addressed the hot topic of **Succession Planning**.

Read on to learn some of the **key take-aways** our participants received from presenter Susan Weinrich, Senior VP for Nonprofit Capacity Building at NYCON.

### Source: NYCON

#### What is Organizational Capacity Building and why is it important?

Capacity Building is an investment in the effectiveness and future sustainability of a nonprofit. It strengthens a nonprofit's ability to fulfill its mission over time, thereby enhancing the nonprofit's ability to have a positive impact on lives and communities.



#### What is Succession Planning?

Succession planning is the process of identifying the critical positions within your organization and developing action plans that prepare new individuals to assume those positions when they are vacated by incumbents.

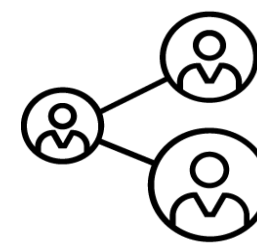


#### Can you please provide a few examples of the types of Executive Leadership Transitions an organization might face and should plan for as it conducts Succession Planning?

A few examples are:

- Founder or long-term leader's retirement
- Forced or unplanned transition
- Chronic turnover
- Routine transition

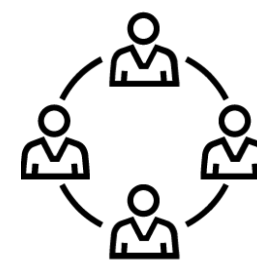
Each of these scenarios poses unique challenges. Succession planning and related capacity building priorities can help strengthen the organization and minimize disruption during a leadership transition.







#### How does a Planned Transition differ from Emergency Succession Planning?

A "planned transition" will focus on the maintenance, strategic, and development-oriented aspects of the transition. It will include the policies, processes, and steps to ensure an orderly, efficient and productive transition and support organizational sustainability.

"Emergency transition planning" addresses who will step-in if necessary. It should include back up policies, processes and steps needed to fulfill key executive leadership functions which may arise due to an unexpected absence, abrupt departure, or planned short-term absence. While maintenance-oriented, an emergency transition plan serves as the basis for a planned transition plan.



#### What key questions might an organization start with as it begins its Succession Planning journey?

-  Is there a clear vision for the future that clarifies what position, skills, and experience will be needed [for the position]?
-  Do the Board and Management understand current skill capacity and gaps?
-  Is it clear who would provide leadership in the Executive Director's absence or departure?
-  Are there redundancies or procedures in place that would enable other staff (or Board members) to take on some aspects of the ED's job?

This is just an introduction to the vital topic of Succession Planning. There are important internal discussions and decisions an organization must make to begin the formal development of its Succession Plan. Potential resources include topic-specific publications, workshops, consultants, and peer learning.

Many funders offer technical assistance and/or grant funding for this work. For a list of additional resources, reach out to us at: [info@thecullenfoundation.org](mailto:info@thecullenfoundation.org)

Visit our friends at NYCON at: <https://www.nycon.org>