

# Is Your Association Ready?

An Executive Succession Readiness Toolkit



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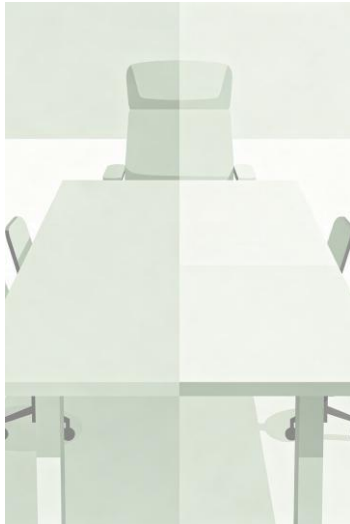


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“If your CSE resigned tomorrow morning,  
what would your board actually do by day’s end?”

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## The Reality of Executive Transition

Succession planning turns disruption into opportunity.

**No Plan** = Disruption, lost knowledge, confidence drops, the mission drifts

**CEO Turnover:** 16% in 2024, interims up from 6.8% to 13.5%, 93% of staff feel impacted \*

### Succession Planning Turns Transitions into Opportunity

- Ensures continuity and organizational momentum
- Maintains trust with members, donors, and partners
- Enables new leaders to step in with clarity and purpose

\* CCS Fundraising's 2025 Philanthropic Landscape:  
<https://www.ccsfundraising.com>.

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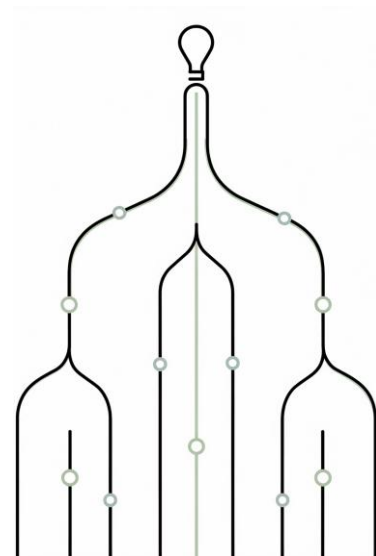
## Defining the Landscape

Three plan types – let's not confuse them

**Transition Plan:** Immediate handover details – passwords, active projects, and access ensuring work continues.

**Continuity Plan:** To maintain essential functions during disruptions – natural disasters, sudden departures.

**Succession Plan:** Strategic process to identify and develop internal talent for future leadership roles, safeguarding long-term organizational stability.



See “The Association CEO Succession Toolkit” by Gary LaBranche for a transition and continuity plan template.

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## Where Is Your Organization Today?

AUDIENCE POLL

Show of Hands

Raise your hand for the answer that comes closest to your current reality.

### Planning

**We have a written succession plan in place.**

Ask - What do you do from time to time to keep the plan current and operational?

### Thinking

**We have a transition or continuity plan, it's not comprehensive.**

Ask - What could you do to plan in depth?

### Wishing

**We assume there will be an internal successor but have no formal process.**

Ask - How could you engage those likely candidates?

### Ignoring

**Succession isn't a serious conversation yet. I don't think we have passwords written down.**

Ask - Where would you begin to plan?

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## If Your Executive Left Tomorrow...

DISCUSSION

Paired — 5 Minutes



Turn to someone near you (preferably in a different succession stage from the prior slide) and answer:

*“If your Chief Staff Executive left tomorrow, what would the board of directors actually do?”*

Be honest.

Be specific.

Be ready to share one insight.

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## Why Succession Planning May Fail

→ **Instinct over Evidence**

Gut feelings replace structured evaluation/objective evidence

→ **Avoidance Until Crisis**

Delaying means loss of options and increases organizational and hiring risks

→ **Unclear Criteria**

Individual board members are biased toward different strengths

→ **Unclear Expectations**

Individuals define the role differently

→ **Strong Operations ≠ Executive Readiness**

Different roles means different demands

📌 **Key principle:** Succession planning is governance — not simply an HR function.

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## The Succession Readiness Toolkit

A practical, board-level framework for making high-stakes decisions with confidence.

01

### Strategic Needs

Where is the organization going? What is the Mission and Strat Plan ?

02

### Decision Criteria

Objective, board-agreed qualities, characteristics, skills, and standards.

03

### Leadership Insight (assessments)

How will this person lead?

04

### Competency Rubric

How do we evaluate consistently?

05

### Structured Interviews

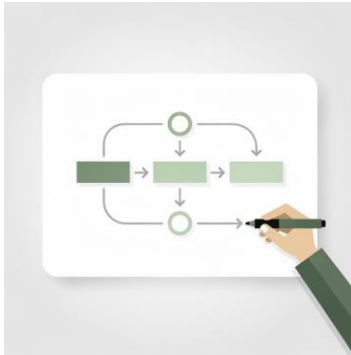
How do we compare equally?

📌 **Key principle:** Good decisions require structure and forethought.

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## First – What does the Organization Need Next?

Before evaluating any candidate — internal or external — the board must align on what it actually requires *next*.



What does success look like?

Short term delivery vs. long-term sustainability

Strategy vs. Operations

Stability vs. Change

Culture vs. visibility

Governance alignment vs. management control?

**Key principle:** The job and responsibilities change the moment the title does.

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## Second - Determine What Qualities are Needed

**TABLE EXERCISE**

Group Discussion — 5 Minutes

Discuss at your table:

1. What are the two most important responsibilities of your Chief Executive?
2. Would every member of the board give the same answer?

Be ready to share one insight from your group.



**Key principle:** If your board doesn't agree on the role, they won't agree on the person.

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## Third – Evaluate Leadership Styles

Use validated tools to understand how someone leads:

### DiSC

Behavioral style, & communication patterns

### EQ-i 2.0

Emotional intelligence under pressure and self awareness

### Big Five

Core personality traits, leadership tendencies

### Predictive Index

Workplace motivations and behavioral tendencies

**Key principle:** Avoid hiring by gut feeling, dive deeper into the candidate's strengths.

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## Fourth – Evaluate Consistently

Score candidates on executive dimensions:

Competency	Scale*
Strategic Leadership	1 2 3 4
Board Relations	1 2 3 4
Financial Oversight	1 2 3 4
External Leadership	1 2 3 4
Staff Leadership	1 2 3 4

• 1 = *Emerging* 2 = *Developing* 3 = *Proficient* 4 = *Advanced*

**Key principle:** Avoid hiring by gut feeling, dive deeper into the candidate's strengths.

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## AUDIENCE POLL

Show of Hands  
Brief Comment

## Which Competency Is Hardest to Evaluate?

**Strategic Leadership**

- Sets direction
- Anticipates risks

**Resource Oversight**

- Understands financial health
- Aligns resources

**Board Relations**

- Builds trust
- Clarifies Board/Staff roles

**Staff Leadership**

- Drives performance
- Builds culture

**Key principle:** If the board can't assess these competencies, it won't select the best next leader.

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## Fifth – Conduct Structured Interviews

Ask questions that reveal leadership:

How do you communicate when you don't yet have answers?

Tell us about a time you disagreed with a Board decision. How did you handle it?

Describe a tough decision with no good options. How did you decide what to do?

What difficult but true feedback have you received? How did you grow because of it?



**Follow up:** What would the board say you could improve in that situation? What did you learn that changed how you lead? What did you stop doing as a result? What would you do differently, why?

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## Internal Promotion Risks

Promoting from within can introduce unique challenges that require thoughtful navigation.



**Peer-to-Supervisor Tension** – strained Relationships, awkward dynamics among team members.



**Earned Credibility** – Former relationships can challenge respect and trust, not always easy or automatic.



**Blurred Expectations** – Employees may continue to treat the new leader as a peer, hindering their ability to set boundaries and lead.



**Underestimated Support** – Boards may assume less needed support, and overlook the challenges of executive leadership.

**Key principle:** The skills and success in a prior position don't always translate to new positions.

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## Real Experience

Show of hands: Who has seen an internal promotion struggle?

### PARTICIPATION

Show of Hands  
Brief Comment(s)



### Optional Share

What went wrong?  
What would you do differently?

*No names please 😊*

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## Scenario Exercise

Break into small groups (3–4 people) to discuss the following:

*The Chief Executive will retire in a few months. The board and most staff are aware, but no public announcement has been made and no search has begun. An internal candidate has expressed interest, and the board has not yet decided whether to promote them.*

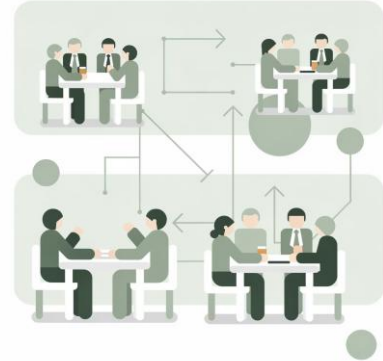
Discuss:

1. What questions should the board ask?
2. What info do they need to make an informed decision?
3. What qualities and criteria should the evaluate?

Be ready to briefly share your insights.

### DISCUSSION

Small Groups, Report Out



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## Avoiding a Promotion that Doesn't Work Out

Planning for an internal promotion requires considering the possibility that it might not succeed. A proactive approach protects both the individual and the organization.

### Clear Expectations

Define success upfront to provide a solid foundation for the new role.

### Defined Milestones

Establish 3, 6, and 12-month checkpoints with agreed metrics and candid feedback.

### Strong Support

Provide coaching, mentorship, and development opportunities.

**Key principle:** Protect the organization and candidate through careful planning and support.

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## Building a Culture of Succession



### Normalize Conversations

Make open discussions about leadership transitions a regular, comfortable part of organizational dialogue.



### Integrate Governance

Embed succession planning into board responsibilities, treating it as a continuous strategic imperative.



### Develop Internal Talent

Invest in growth and mentorship for high-potential employees to prepare them for future executive roles.

**Key principle:** Succession readiness is a discipline; Succession planning is governance.

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## Key Takeaways



### Clear Decision Criteria

Establish explicit skills, abilities, and candidate characteristics that are directly related to near-term organizational needs.



### Leadership Insight (Assessments)

Utilize validated tools to uncover deep leadership potential and capabilities without the influence of personal bias.



### Structured Evaluation (Rubric)

Implement a standardized uniform interview process for objective and comparable candidate assessment.



### Support and Development

Ensure newly promoted leaders, at all stages and levels, receive appropriate support and continual development.

**Key principle:** Succession planning protects the organization by ensuring continuous leadership and stability.

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## Before you Leave

### Ask yourself:

- Do we have clear criteria for the next CSE?
- Are we preparing anyone—or just hoping?

### If not:

- Align on what the organization needs next.
- Develop staff to meet those needs.

### Connect with me:

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