

# THINKING FIVE YEARS AHEAD

This exercise can be done by executive directors to create an individual action plan, but it is also useful to do in small groups of staff and board members.

## **PURPOSE OF THIS EXERCISE:**

To help executive directors or staff members assess and plan for future leadership transitions, and develop a shared understanding of what needs to be done in the organization.

## **HOPED-FOR OUTCOMES:**

- Help executive directors and staff members assess current strengths
- Identify next steps needed to prepare for leadership transitions
- Set individual or communal goals for moving forward

## **STEP 1**

The first column of the table on the next page lists some concrete changes that organizations can make now that will help in future transitions. Identify how well your organization is doing in each area and what the needed next steps are. You can do this on your own, or in pairs or small groups.

## **STEP 2**

Once you have filled in the table, use your answers to guide a larger discussion with others in your organization. You can use the following questions to help shape the discussion:

- Where do you agree?
- Where are there differences in your answers? Are these differences significant?
- Where should your first steps be?
- Who wants to continue to work on and lead these issues?

TABLE 1: THE GENERATIONAL LEADERSHIP TASKS

TASKS	WHAT ARE WE DOING NOW?	WHAT ARE SOME PRIORITY NEXT STEPS?
<p><b>Staff leadership development</b></p> <ul style="list-style-type: none"> <li>• Recruit and support younger staff.</li> <li>• Make commitment to staff leadership plan.</li> <li>• Create opportunities for younger staff to take greater responsibilities.</li> <li>• Develop pathways to increased organizational leadership roles for staff members.</li> <li>• Encourage board members, funders, and supporters to get to know younger leaders.</li> </ul>		
<p><b>Board leadership development</b></p> <ul style="list-style-type: none"> <li>• Recruit and develop younger board members.</li> <li>• Provide board opportunities to participate in the daily work of the organization.</li> <li>• Involve younger board members in fundraising and meetings with donors and other supporters.</li> </ul>		
<p><b>Getting ready to plan the transition</b></p> <ul style="list-style-type: none"> <li>• Identify resources—peers, reading, workshops, consultants—to prepare all levels of the organization.</li> <li>• Look for retreat or sabbatical opportunities for the executive director to step back and think about how and when to leave the organization.</li> <li>• Support older leaders to talk with peers about future work and movement contribution possibilities and to explore potential future options.</li> </ul>		

