



Succession Planning Survey

Results and Analysis

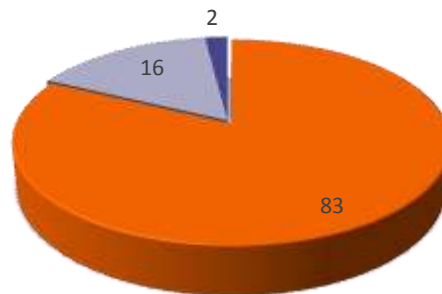
August 2017

Recent studies in Northern Ireland and the United States have found that up to 45% of third sector chief officers intend to leave their post within the next five years, meaning that it's more important than ever that organisations have strong succession planning policies in place now.

ACOSVO wanted to know what these figures look like in Scotland, so we can tailor new events and services to the needs of our members. The following data corresponds with 101 respondents to our survey that was online for just over six weeks.

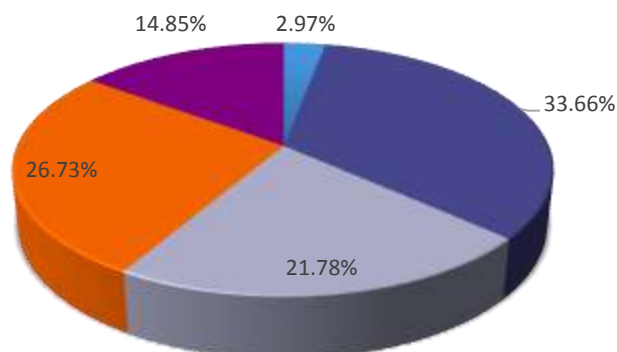
Demographics

Please state the role you hold within your current organisation:



■ Chief Officer (or equivalent) ■ Senior Director/Manager ■ Other (please specify)

Please Indicate your current organisational turnover:

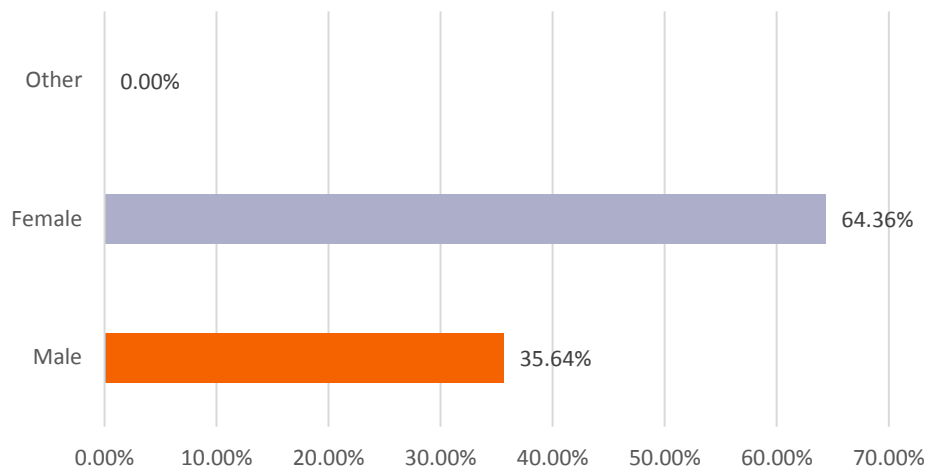


■ Under £100k ■ £100-£500k ■ £500k-£1M ■ £1M-£5M ■ Over £5M

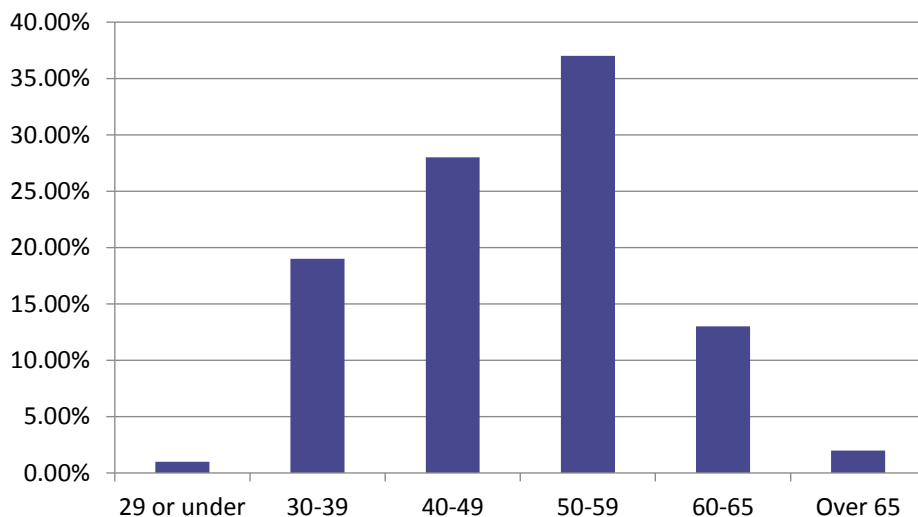
TURNOVER (£)	SURVEY RESULTS	2017 TRENDS ANALYSIS
Under 100,000	2.97% (5 th)	9.07% (5 th)
100,000 – 500,000	33.66% (1 st)	29.81% (1 st)
500,000 – 1,000,000	21.78% (3 rd)	12.31% (3 rd)
1,000,000 – 5,000,000	26.73% (2 nd)	25.91% (2 nd)
Over 5,000,000	14.85% (4 th)	10.58% (4 th)

The above table provides a comparison between the respondents of the survey and the ACOSVO member base (derived from the 2017 Trends Analysis) when considering the turnover of the organisation. As shown, the survey provided results of appropriate proportion with regards to turnover with organisations making between 100,000 and 500,000 being the majority.

What is your gender?

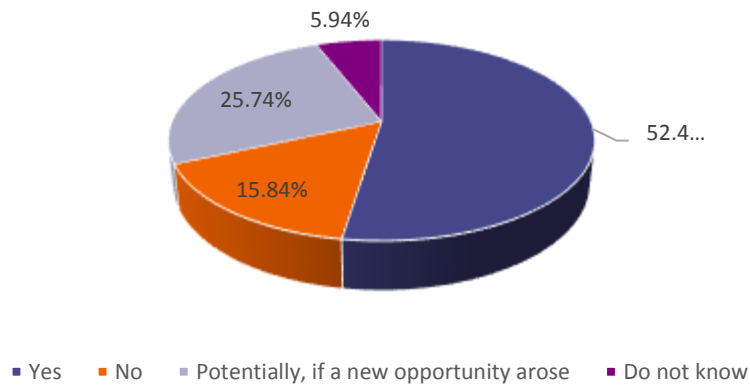


What is your age?

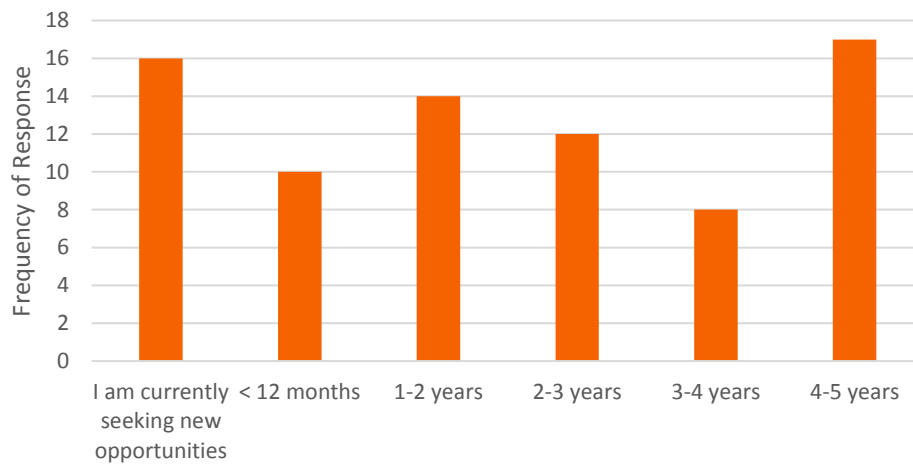


Succession Planning

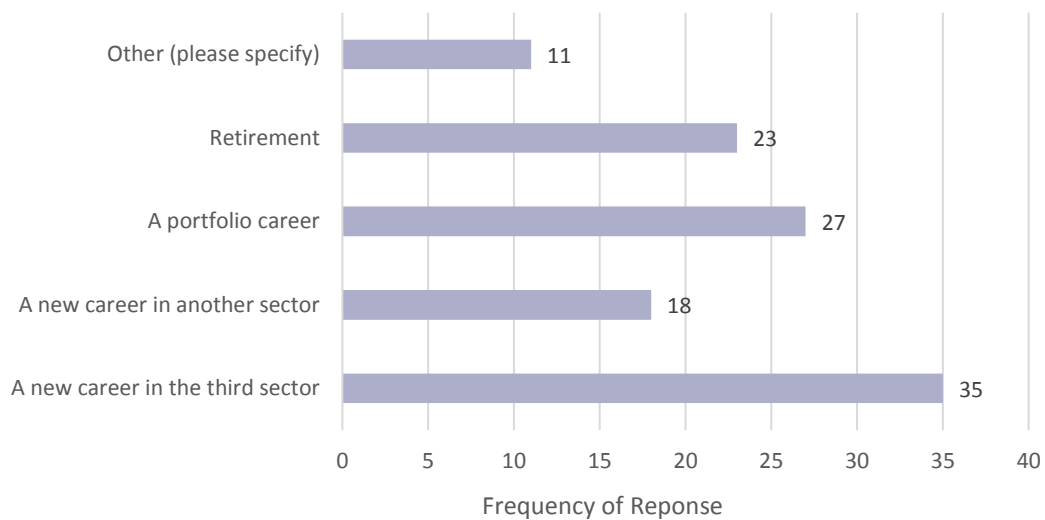
Are you considering leaving your post within the next five years?

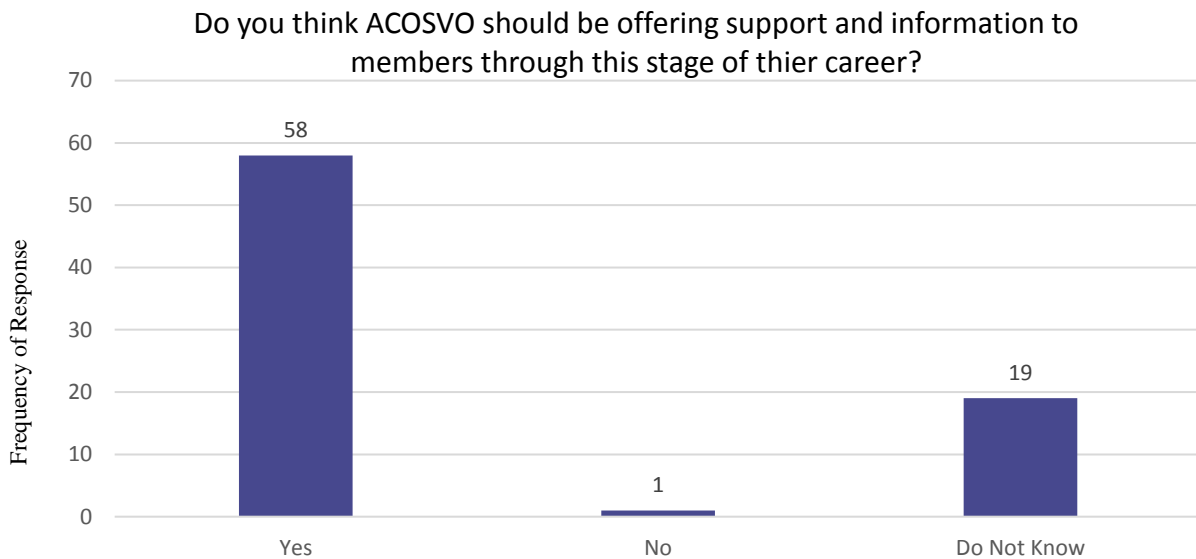


Within what time-frame are you considering leaving your post?



What kind of opportunities are you looking to pursue?



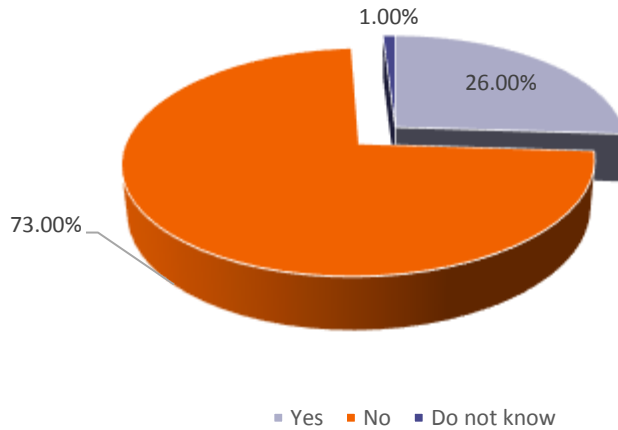


** The individual who answered 'no' did not leave an explanation for their response

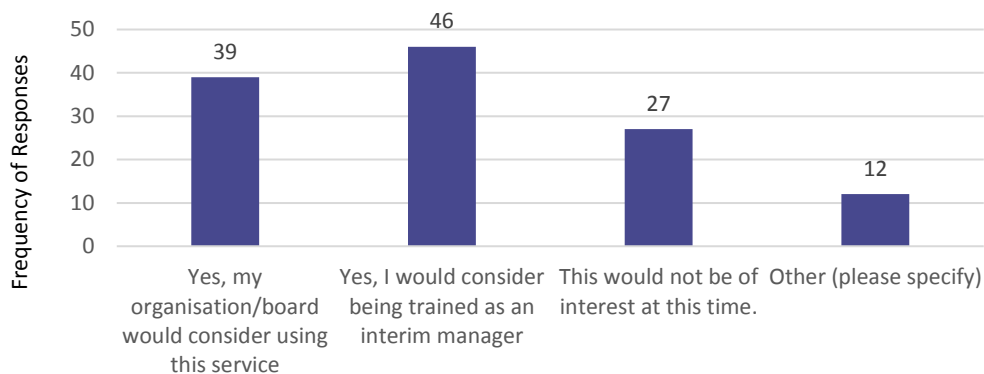
Below are some of the 24 written responses that were provided by the respondents with regards to this question:

- It would be good to hear from previous CO's who have transitioned into total/semi-retirement or more portfolio careers; good and bad points etc. Perhaps act as gateway to CO's looking to transition for those looking for our skill set?
- Careers advice, personal development 1:1 sessions
- I wonder if there's an income opportunity for ACOSVO here if you can discretely act as a kind of brokering agent - connecting organisations that are looking for new leaders with people expecting to move on?
- ACOSVO's help to even start scoping, planning, thinking about options would be a real help. How have other retiring CEOs approached this? What do people like Anne Houston (Children 1st), Marjory Burns (British Heart Foundation) etc. 'do next' i.e. post retiring from their 'big job'?
- Support to Boards on succession planning processes: when to start, how to review future Job Role etc.
- Succession planning, forward personal planning e.g. options available. Meeting actually or virtually with people in similar situation like a support/info sharing group.
- The mentoring is a potential means of getting advice/support. Perhaps a workshop on making the next move would be helpful.
- Whilst it is the choice of individuals to retire, there is potential for the expertise and experience that has been built up not be lost. This could be done by developing potential for individuals to become trustees (not necessarily in the same area as their work) and to use the talent for mentoring and coaching which perhaps ACOSVO could do some further matching. I think this happens already.

Does your organisation have a succession plan in place?



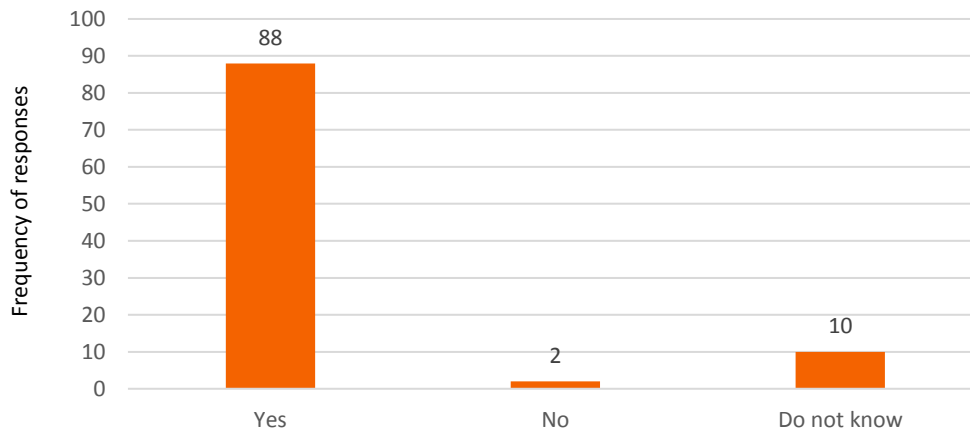
ACOSVO is considering developing a bank of trained interim managers, who could work with organisations on a temporary basis during a period of succession planning/implementation. Would this be of interest?



Below are some of the written responses that were provided by the respondents with regards to this question:

- This may be helpful in principle - would be good to know it's Available
- In terms of planned succession processes, find it difficult to understand this concept / value of it
- I think this sounds like an interesting opportunity. There would be added trust knowing we were linked with ACOSVO in a development like this. Having the right policy in place would also support with something like this. It would also provide an opportunity for reflection on the role, the organisation structure etc in advance to committing to one candidate moving forwards.
- I am not sure whether this would be something my board would consider, I don't have a long notice period so if I did leave they may have to think about it
- It is not of immediate interest but would have been useful to have as an option to consider when we started planning

Do you think ACOSVO should be offering succession planning support and information?



Below are some of the 16 written responses that were provided by the respondents with regards to this question:

- I'd like a discussion about what this might actually mean in practice other than CO should give long notice period, then recruitment starts at point when official notice given. What else can be done to really "plan"?
- Doubtful if the volunteer Board will accept any support in regards to this.
- I think there's potentially 2 things. One is what to do immediately when a CEO leaves - interim solutions, supporting deputies etc (as below in fact!). Two is supporting boards to recruit new CEOs.
- Training/input on how to identify and nurture future leaders.
- We are considering the development of a policy in relation to senior management and board posts (chair, treasurer). Input to something like this would be valuable.
- I used a template succession planning tool I found on the internet and it was helpful. Maybe a collection of resources organisations can use would be useful.
- I can only think of the obvious typical tasks that need a CEO's overview such as change management, tendering, governance support, practical CEO duties (staff and financial management), budgeting, etc. Workshops /self-audit tools /practical steps to succession Planning
- I think this is real issue for smaller organisations, help support even guidance/toolkit on handover reminders, examples of best practices/approaches, info to share with boards etc
- Linking members to useful training (even if not provided by ACOSVO) would be helpful. Management, Leadership, Project Management, Managing Change, Supervision, Mentally Healthy workplaces etc.
- It might be helpful to get us thinking about what this means and what it would look like in practice