



**Seminar Briefing – October 2009**

# **Managing Strategic Change**

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Any organisation should have an understanding of the environment in which it operates, in order to be able to plan effectively for the future. A strategic plan provides direction for the organisation. It is also a useful tool when succession planning, giving an indication of the range of skills, experience and knowledge that will be needed to achieve the objectives identified in the plan.

This seminar held on 21<sup>st</sup> October 2009 looked at strategic planning and in particular succession planning and provided a helpful discussion on good and bad practice within the voluntary and community sector (VCS).

## **Managing succession within your organisation**

**Ruth Lesirge**, Visiting Fellow and Head of Governance Practice, Centre for Charity Effectiveness, Cass Business School.

Ruth began by stating that succession planning was a planned programme of professional development which increases the skills, knowledge and attributes of staff members and enables them to move into senior roles. Organisations benefit much more from a structure which creates a team of senior managers rather than a structure which does not support that the potential for staff development and promotion.

Ruth went on to say that the values and principles which drive the organisation should also apply internally. Giving the example of equalities, Ruth states, that if as an organisation we are very clear on the principles of equality and what equality should be, then practicing equality internally should also be invested in, making succession planning much easier to understand and implement.

In answering the question on how an organisation can build staff loyalty. Ruth answered that investing in succession planning in itself builds loyalty. It is wrong for an organisation to operate under the guise that they will not develop staff as they will leave anyway. Ruth went on to say that voluntary and community organisations that invest in staff development are also investing in human capital which ultimately the sector will benefit from. If in the end that person leaves they to work in another organisation they bring those skills with them and they will be replaced by someone who's previous organisation has invested in to develop their skills, therefore leading to a win-win situation because it improves organisation efficiency, it improves the quality of staff in the

organisation and in the borough which is ultimately good for the sector and for the communities we support.

In describing how succession planning should be carried out, Ruth laid out some key points for senior management

1. Choose your target cohort or team for development
2. Consider together what should be included in the professional development of staff
3. Agree an annual professional development programme
4. Set a process for tracking and reviewing development
5. Build on the reviews as part of the annual appraisal.

### **Managing succession planning through merger**

The next presentation was given by **Cynthia Dize** from Age Concern Kensington and Chelsea. Cynthia gave a background to the events which led to the merger of Sixty Plus and Age Concern. After an agreement to undertake a feasibility study which undertook an appraisal and comparison of the two organisations recommendations were made that the two organisations could merge. Following the recommendations both organisations worked very closely together to gain a consensus on the way forward in terms of their values and aims as a joint organisation. Cynthia listed the agreed aims which ensured both organisations were on a path to a successful relationship, some of these included:

1. to support older people to remain independent
2. to promote partnerships between older and younger people
3. to ensure the provision of accessible, accurate and comprehensive information
4. to promote the health and wellbeing of older people
5. to identify gaps in services and work cooperatively to address unmet need.

Cynthia went on to say that as a merged organisation the benefits must bring a more seamless and comprehensive service which better facilitates the views of older people, to become more efficient and effective and to provide a platform for innovation.

Cynthia alluded to the fact that service reviews were ongoing which were looking at developing services and staff skills but believed more needed to be done to address the issue of succession planning.

Cynthia closed by stating the process of the merger was very challenging and required lots of hard work but it has been worth it. One lesson learnt was that the values must be agreed first and to stay focussed on those much more than the brand itself as it is the values which will ensure a stronger relationship as both organisations merge.

## **A Real Case Study of Succession**

**Tasio Cabello** spoke of his experience working for Age Concern KC. He was promoted from volunteer to centre manager. Tasio stated that the ongoing support he received has been invaluable and has helped him to feel like a valued member of staff. As an individual Tasio said it was important to develop your skills as this encourages you to value your organisation and help to motivate other members of staff to do the same.

## **QUESTION AND ANSWER SESSION**

**How did the merger between Age Concern and Sixty Plus help create a new team spirit?**

It was important that the senior management team instilled a feeling of excitement and new possibilities throughout the organisation which encouraged the rest of the staff team to feel the same and help build that team spirit.

**How did the users of the services of Age Concern and Sixty Plus take on the change?**

The older people were quite pragmatic once they realised that the services and involvement would stay the same but trying to convince them of a name change was more difficult as they still felt passionate about the name Sixty Plus.

**How can a restructure and succession planning take place in a way which compliments each other?**

The main thing to remember is that restructuring should not be done to get rid of people it should be made clear that they are getting rid of the post and not the individual.

## **Further Reading**

*50 Ways to Develop People* by Andrew Forrest

[www.knowhownonprofit.org](http://www.knowhownonprofit.org)

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