

Assessing Your Organization's Readiness for the Metcalf Renewal Fellowship Initiative

A sabbatical can be an exciting, restorative experience for an organizational leader. Assessing your own readiness to hand over the leadership reigns is a critical step to ensuring a positive sabbatical and return to your organization. You need to be clear about your expectation of the role your replacement will play in your absence. Your Board also needs to be well prepared to support the Fellowship transition process.

In order to ensure your readiness and that of your board to embrace this opportunity there are a number of questions you may want to consider asking yourself and discussing with your board prior to submitting a Renewal Fellowship application. Ask yourself:

- Am I prepared to discuss my application plans with my board and to keep them involved throughout the sabbatical planning process? How do I anticipate preparing the organization and myself for both my absence and eventual return if we are not jointly planning for the sabbatical? How will I respond if the board is not fully supportive of my Renewal Fellowship?
- Does my organization have a succession plan in place that the Board can draw upon to enable a smooth transition during my sabbatical absence?
- Is there an internal staff person who would be able to step into my role (per the succession plan)? If so, how do I anticipate the other staff will respond to this individual? What kind of supports can I put in place to assist this staff person to take on my current role? What issues, if any, do I foresee upon my return when this internal staff person must return to their previous position? What are the pros and cons for using an internal replacement versus bringing someone in from the outside?
- How am I viewing the role of my replacement – as a maintainer of the status quo, someone who will move the organization forward, or possibly take it in a different direction?
- To what degree am I prepared for the possibility that in my absence unforeseen events may arise that result in the interim leadership making changes that are approved by the board but which I would not have made? For example, staff turnover resulting in new hires that I would not have chosen.
- How strong and experienced is my current board? Are we anticipating significant board turn-over in my absence? How might this affect the organization? Am I prepared that the new board recruits may have a different way of operating and vision for the board's role in the organization than their predecessors?
- Does my organization have an operational plan that is monitored regularly that describes how the strategic goals/priorities of the organization will be achieved in the short-term? If not, is it feasible to prepare and implement one in advance of my sabbatical to support the board and staff in my absence?