

# Template Training Tuesday: Staff Guide & Succession Plan



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# Overview

- 1. Welcome**
- 2. What is a Staff Guide? What is a Succession Plan?**
- 3. Why should God's workers use them?**
- 4. How can you adapt them?**
- 5. What if you used them? (Testimony)**
- 6. Q & A**
- 7. Wrap-up**



# What is a Staff Guide?

**A Staff Guide contains the personnel policies for a church or ministry. It must comply with local employment laws. It also outlines the values of the church or ministry and the corresponding expected code of conduct for staff.**





# What is a Succession Plan?

**A Succession Plan outlines a clearly defined set of processes for addressing CEO transitions whether related to resignation, removal, or any other reasons (both voluntary and involuntary).**



## Succession Plan

### Part 1: Introduction

The goal of this plan is to maintain the effective continuity of GTP programs and operations as well as the preservation of external and internal constituent confidence in the event of President & CEO succession. This plan prepares GTP for a change in the office of the President & CEO, whether the change is anticipated or unexpected. Changes in VP or senior staff will be overseen by the President & CEO to whom they report.

Succession is necessary for different reasons including but not limited to death, retirement, permanent or temporary mental, physical or emotional incapacity, legal incapacity, or malfeasance. All staff members including the President & CEO have a right to procedural fairness which includes a thorough investigation when a grievance is lodged as stated in the GTP Staff Guide.

This succession plan is a basic framework that can be adapted and modified as needed to provide guidance to the board and staff. The board is committed to serving GTP staff, regional facilitators, and the entire global network by being prepared with this plan and a clearly defined process. The appointment of the President & CEO is one of the board's most important tasks and is solely its responsibility.

The President & CEO is responsible for having an emergency plan in place that any new President & CEO may consider to execute. The plan should reference specific items to address in an emergency situation as well as general items for attention in the immediate week, month, quarter, and year.

### Part 2: Succession by Notification

In most non-contentious or non-emergency situations, the President & CEO should inform the board of their resignation no less than 90 days or in the case of absence or incapacity, no less than 45 days if possible. The board would prefer a notice period of 6 months to 1 year. Upon receiving notification, the executive committee of the board shall determine whether a transition period is in order or if the automatic delegation of President & CEO duties is necessary.

### Transition period

The transition period and process will be determined by the executive committee of the board and the outgoing President & CEO if transition is due to resignation or retirement. In all other situations the executive committee shall solely determine the period and process. This transition period and process is preferred for continuity of relationships to preserve public trust.

The biblical example of Moses and Joshua is especially informative to illustrate a transition period (Numbers 27:15-23). In that text, some authority passes to help the constituents embrace the successor including an event with public affirmation and commissioning by the outgoing President & CEO. Such a timeframe and events will be orchestrated by the executive committee with the transition plan approved by the full board as stated in the GTP Transition Plan.



# Why should God's workers use a Staff Guide?

**Board: Honor God / Comply with laws (2 Cor 8:20-21)**

- Describes values and employment parameters
- Outlines commitments and legal boundaries

**Staff: Ensures fair treatment (Matt. 10:10)**

- Understands duties and expected conduct
- Enables procedural fairness in times of conflict

**Supervisor: Unites human resources (Eccl 4:9)**

- Empowers staff for faithful work and evaluation
- Creates a healthy culture and work environment



# Why should God's workers use a Succession Plan?

## **Resign or Retire - Sketches transition - (Num 27:15-23)**

- **Sets expected notification timeframe (90 days)**
- **Includes overlapping service as appropriate**
- **Outlines process so you stay focused on mission**
- **Avoids power struggle**

## **Remove - Outlines urgent steps (Psalm 109:8)**

- **Identifies process of automatic delegation**
- **Reassigns duties according to interim plan**
- **Maintains church or organizational stability**



# How can you adapt the Staff Guide?

**Consider Four Steps:**

- 1. Get template from legal counsel that complies with local laws.**
- 2. Compare it to GTP template.**
- 3. Edit it to match your church or ministry.**
- 4. Get board approval.**

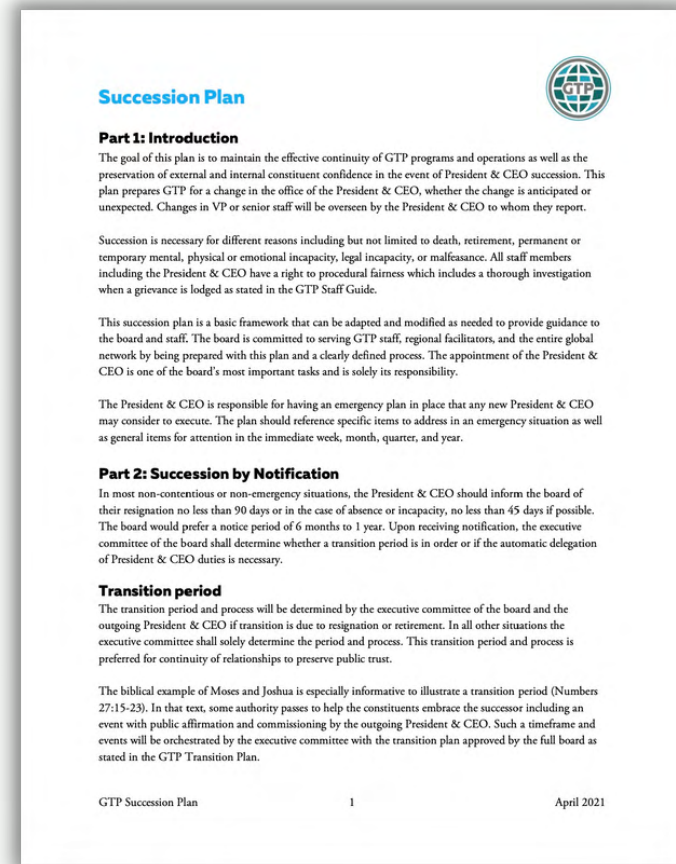




# How can you adapt the Succession Plan?

## Consider Four Steps:

1. Download GTP template.
2. Review it with your board officers.
3. Adapt the automatic succession steps.
4. Get board approval.







# What if you used the Staff Guide and Succession Plan?

What outcomes can your church or ministry anticipate?



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GTP Board Member



# Questions & Answers



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