

# Leadership Succession Planning in Catholic Schools

A Stewardship Framework for Mission Continuity

## Succession as Stewardship

Catholic schools exist to serve a mission that transcends any individual leader. Presidents, principals, advancement directors, board chairs, and committee leaders all serve for a time. The mission itself endures.

Succession planning, therefore, is not simply an operational exercise. It is an act of stewardship.

Catholic governance rests on several enduring principles. Stewardship means that authority is entrusted, not possessed. Subsidiarity places decisions at the appropriate level of leadership.

Communion recognizes that leadership operates in relationship rather than isolation.

Discernment calls leaders to make significant decisions with reflection, consultation, and prayerful judgment.

Succession planning embodies all four.

It clarifies authority before a crisis occurs. It respects proper roles within governance and management. It strengthens collaboration between the president and the board. Most importantly, it prepares the school community for leadership transition with prudence rather than panic.

When done well, succession planning reduces institutional risk and strengthens trust among faculty, families, donors, diocesan leadership, and the board itself. The goal is not to anticipate failure but to ensure continuity of mission.

This paper outlines a practical governance framework for Catholic schools—both independent and diocesan—to structure leadership continuity responsibly.

### Succession Planning Is Institutional Estate Planning

Most people understand the importance of estate planning. Responsible adults eventually create a will, establish powers of attorney, and clarify who will make decisions if they cannot. Estate planning protects families from confusion and conflict during difficult moments.

Yet many people delay estate planning for years.

Not because they question its value, but because the conversation feels uncomfortable. Estate planning forces us to acknowledge that we will not always be present. It requires us to think about transitions we would prefer to postpone.

Institutional succession planning faces the same challenge.

Boards and presidents understand that leadership transitions will eventually occur. Presidents retire or move on. Board chairs complete their terms. Key staff members depart. No institution is exempt from leadership change.

Yet succession planning is often delayed for the same reasons families delay estate planning. Discussing successors can feel disloyal to successful leaders. Imagining a sudden vacancy can seem pessimistic. When leadership is functioning well, it is easy to assume there will always be time to address succession later.

Unfortunately, “later” is not always available.

When transitions occur without preparation, uncertainty multiplies at exactly the moment when clarity is most needed. Succession planning reduces that uncertainty. It clarifies who leads temporarily, how decisions will be made, and how the institution will move forward until permanent leadership is in place.

Succession planning, like estate planning, is ultimately an act of stewardship—an expression of care for the people who will carry the mission forward.

## Governance Foundations

Succession planning becomes difficult when authority and responsibility are misaligned.

In Catholic schools, responsibilities are generally structured in three levels.

The president holds responsibility for operational leadership and the management of staff. The board governs the institution and is responsible for hiring and evaluating the president. In diocesan schools, the bishop or diocesan authority retains canonical authority over key appointments. Finally, the board chair bears particular responsibility for maintaining continuity in governance leadership.

When these roles are respected, succession planning becomes straightforward. When they blur, confusion quickly follows.

Boards sometimes drift into micromanagement of staff succession, undermining presidential authority. At other times boards disengage entirely, assuming succession is someone else's responsibility. Both approaches weaken governance.

Succession planning is not about expanding authority. It is about clarifying authority before it is stress tested.

## Presidential Succession

The most important element of any succession framework concerns the presidential role. The president is responsible for the day-to-day operations of the school. A school may survive a short vacancy in the board chair, but is unlikely to thrive with any significant vacancy of the presidency.

The president, working in consultation with the board chair, should maintain a written succession plan that is reviewed annually. The plan need not be lengthy, but it must clearly address what happens if the president is suddenly unable to serve.

At minimum, the plan should identify an interim leader who can assume authority immediately. The document should also clarify the scope of that authority and identify who communicates with key stakeholders such as faculty, families, donors, and diocesan leadership.

In addition, the plan should include a basic delegation map identifying which operational functions must continue without interruption and which responsibilities can temporarily pause. Financial oversight and institutional communications typically fall into the first category.

Finally, the plan should note critical external relationships, including diocesan leadership, accrediting bodies, and major donors.

The board holds responsibility for appointing an interim president. In most cases the president's recommendation regarding interim leadership will carry significant weight, but the final decision rests with the board.

The board is also responsible for defining the process that will ultimately lead to the selection of a permanent president. This responsibility usually rests with the board's executive committee and includes defining the leadership profile, determining the structure of the search process, and establishing an appropriate timeline.

In diocesan schools, this process must align with diocesan policy and episcopal authority. A well-governed board approaches this responsibility with humility and discipline: offering thoughtful recommendations while respecting the authority of the bishop and diocesan leadership.

Strong boards do not compete with episcopal authority. They support it through preparation and clarity.

# Succession Planning for Key Staff

While the board is responsible for presidential succession, succession planning for key staff positions is the responsibility of the president.

Most schools rely heavily on a small number of critical roles, often including the principal, chief financial officer, advancement director, and admissions director. When one of these positions suddenly becomes vacant, the school can experience operational disruption unless a basic plan already exists.

For each key position, the president should identify who would assume responsibilities on an interim basis if the position suddenly became vacant. The plan should also identify any time-sensitive responsibilities that must continue immediately, such as financial reporting, donor communication, or admissions timelines.

Equally important is knowledge continuity. Critical documents, system access, and important external relationships should never be known only to a single individual. While this may seem obvious, many organizations discover too late that essential institutional knowledge resides in only one place.

Finally, the president should maintain a basic framework describing how a search for a permanent replacement would occur. This need not define every step, but it should clarify who leads the search and what advisory role the board might play.

The board's role in staff succession is advisory rather than managerial. Board members may provide insight into leadership needs or institutional priorities, but the president retains authority for staff hiring.

Advisory does not mean disengaged. It means that governance respects the proper boundary between strategy and operations.

The wise president will share the staff succession plan with the board chair (and possibly the executive committee). The wise board chair will offer support and advice while making clear that staff succession planning belongs ultimately to the president.

If a president does not feel comfortable sharing a staff succession plan with the board chair, the school may have deeper governance issues than succession planning alone.

## Board Leadership Succession

Institutional continuity depends not only on administrative leadership but also on governance leadership.

The board chair should maintain a clear plan for leadership transition within the board itself. Most effective boards establish a vice-chair or chair-elect role that allows an incoming chair to learn the responsibilities before assuming them fully.

Ideally, the board should also identify likely successors to the vice-chair role so that leadership continuity extends several years into the future. This type of planning allows boards to cultivate leadership intentionally rather than scrambling to fill roles at the last moment.

Committee leadership should follow a similar pattern. Chairs often serve terms of two or three years, but boards function best when a future leader is already being prepared before a transition occurs.

Just as the president may consult the board chair on staff succession, a healthy board chair-president relationship also allows the board chair to consult the president regarding board chair and committee chair succession. The board retains full responsibility for its own leadership succession, but the president's perspective on board leadership effectiveness is often valuable.

The governance or membership committee typically plays the key role in this process. In addition to recruiting new board members, the committee should actively monitor leadership development within the board and anticipate transitions well before they occur.

In this sense, board recruitment itself becomes a form of succession planning. Every new board member represents a potential future leader of the institution.

## Diocesan Context: Authority and Collaboration

Succession planning in diocesan schools involves an additional layer of responsibility because authority is shared among several actors.

The bishop often retains final authority over presidential appointment, while the local board provides governance insight and the president offers operational expertise. These roles are complementary rather than competitive.

A healthy governance culture assumes that the board will provide disciplined recommendations while the bishop exercises final authority. This relationship functions best when both sides approach succession decisions with mutual respect and a commitment to the mission of Catholic education.

The board chair can strengthen the relationship with the bishop by scheduling a short annual meeting simply to remain in conversation about the life of the school. Succession planning can appropriately be part of that discussion—not to seek approval for a future decision, but to ensure the bishop is aware of the board’s thinking and has an opportunity to offer guidance well before a transition becomes necessary.

Discernment is particularly important in this context. Leadership transitions should not be reactive or driven by immediate pressures. Instead, they should be guided by thoughtful reflection on institutional needs, financial sustainability, Catholic identity, and the long-term future of the school.

Discernment does not imply hesitation or indecision. Rather, it reflects a deliberate effort to listen carefully before acting.

## Starting Small

Many schools have no formal succession planning in place. While this can feel daunting, the task does not need to begin with a comprehensive manual.

The simplest starting point is a single question:

If the president were unable to serve tomorrow, who would act immediately?

Writing down that answer—and reviewing it annually—dramatically reduces institutional risk.

From there, schools can gradually expand the framework by identifying interim coverage for one key staff role, establishing a vice-chair or chair-elect structure within the board, and ensuring that the governance committee is tracking leadership pipeline.

Succession planning grows over time. The important step is simply to begin.

## Conclusion

Leadership in Catholic schools is temporary. The mission is not.

Succession planning does not imply pessimism or distrust. Rather, it reflects responsible stewardship and respect for the institution’s long-term stability.

By preparing thoughtfully for leadership transitions, Catholic schools protect donor confidence, faculty morale, governance credibility, and—most importantly—the continuity of the mission entrusted to them.

Strong institutions plan transitions before they need them.

## About the Author:

ILEE is grateful to Rich Barth for writing this exceptional and practical guide to succession planning. Rich Barth is a graduate of the United States Naval Academy and the Massachusetts Institute of Technology. His professional career—including service in the U.S. Air Force and roles at Microsoft—shaped a disciplined, analytical approach to leadership, organizational design, and long-term planning.

In retirement, Rich has dedicated his time to education and youth-serving organizations, with a particular focus on Catholic schools. He has served on the board of Seattle Nativity School for nearly a decade, including roles as Treasurer and Board Chair, and recently led a structured leadership succession process, which he continues to support as Past Chair. His broader experience includes board service with children’s museums and twelve years as a Scoutmaster with Scouting America. These combined experiences inform his belief that effective governance—particularly thoughtful succession planning—is essential to sustaining mission-driven institutions.

# Leadership Succession Planning Checklist

## *Annual Governance Tool*

Succession planning protects the continuity of mission in Catholic schools. This checklist provides a simple annual review framework for presidents and boards.

### **1. Presidential Continuity (Board Responsibility)**

- Interim successor to the president identified
  - Interim leadership authority clearly defined
  - Presidential succession plan reviewed within the past 12 months
  - Board understands the process for appointing an interim president
  - Board executive committee understands the process for a permanent presidential search
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### **2. Board Leadership Continuity (Board Responsibility)**

- Vice-chair or chair-elect in place
  - Likely successor to the vice-chair/chair-elect identified
  - Board chair transition timeline understood
  - Governance or membership committee monitoring leadership pipeline
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### **3. Key Staff Continuity (President Responsibility)**

- Interim coverage identified for key staff roles  
Typical roles include:
    - Principal
    - Chief Financial Officer
    - Advancement Director
    - Admissions Director
  - Interim responsibilities clearly understood
  - Staff succession plan shared with the board chair
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### **4. Committee Leadership Continuity (Board Responsibility)**

- Successors identified for major committee chairs  
Examples may include:
  - Finance Committee
  - Development Committee
  - Governance / Membership Committee
- Committee leadership transitions planned before term completion

## 5. Board Pipeline (Governance Committee Responsibility)

- Board recruitment aligned with future leadership needs
  - Board term expirations reviewed annually
  - Potential future board leaders identified
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## 6. Diocesan Relationship (Where Applicable)

- Board chair maintains regular communication with the bishop or diocesan leadership
  - Succession planning discussed periodically to ensure alignment and avoid surprises
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## 7. Annual Review

At least once per year:

- President and board chair review presidential succession framework
  - Governance committee reviews board leadership pipeline
  - Board confirms interim leadership readiness
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## Key Governance Principle

Authority and responsibility must remain aligned.

- The **president** is responsible for staff succession planning.
- The **board** is responsible for presidential succession.
- The **board** is responsible for its own leadership succession.

Healthy governance allows consultation across roles while maintaining clear responsibility.