



The
**STRATEGY
GROUP, LLC** presents

Building Your Bench Strength: Nonprofit Succession Planning

FREE WEBINAR

March 22

9am

Wednesday

www.thestrategygroupllc.org



Host:
Debra Hertz, Ph.D.
Managing Partner
The Strategy Group

Guest Speaker:

Ed Krow
Talent Transformation
Expert
EDKROW.COM



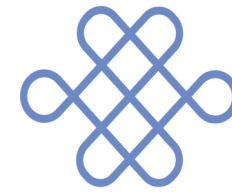
Why Do You Need a Succession Plan?

- A succession plan is a nonprofit's outline for how they'll ensure leadership continuity.
- Succession planning works best when it's viewed as an ongoing responsibility that's closely tied to the nonprofit's overall management strategy.



Zoom Poll:
What brings you here today?

Do you have a ...

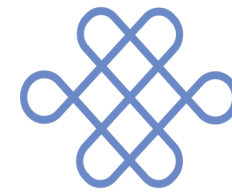


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SUCCESSION PLAN

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Why Succession Planning?



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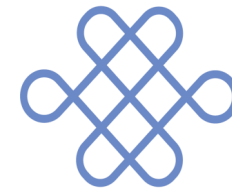
1. Planning in the event of a short-term temporary absence.
2. Planning in the event of a long-term, temporary absence.
3. Planning in the event of a permanent, unplanned absence.
4. Planning in the event of a permanent, planned absence.



Applies to both **STAFF** and **BOARD** leadership!

Creating a Succession Plan:

For Your Staff

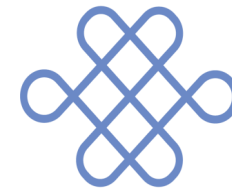


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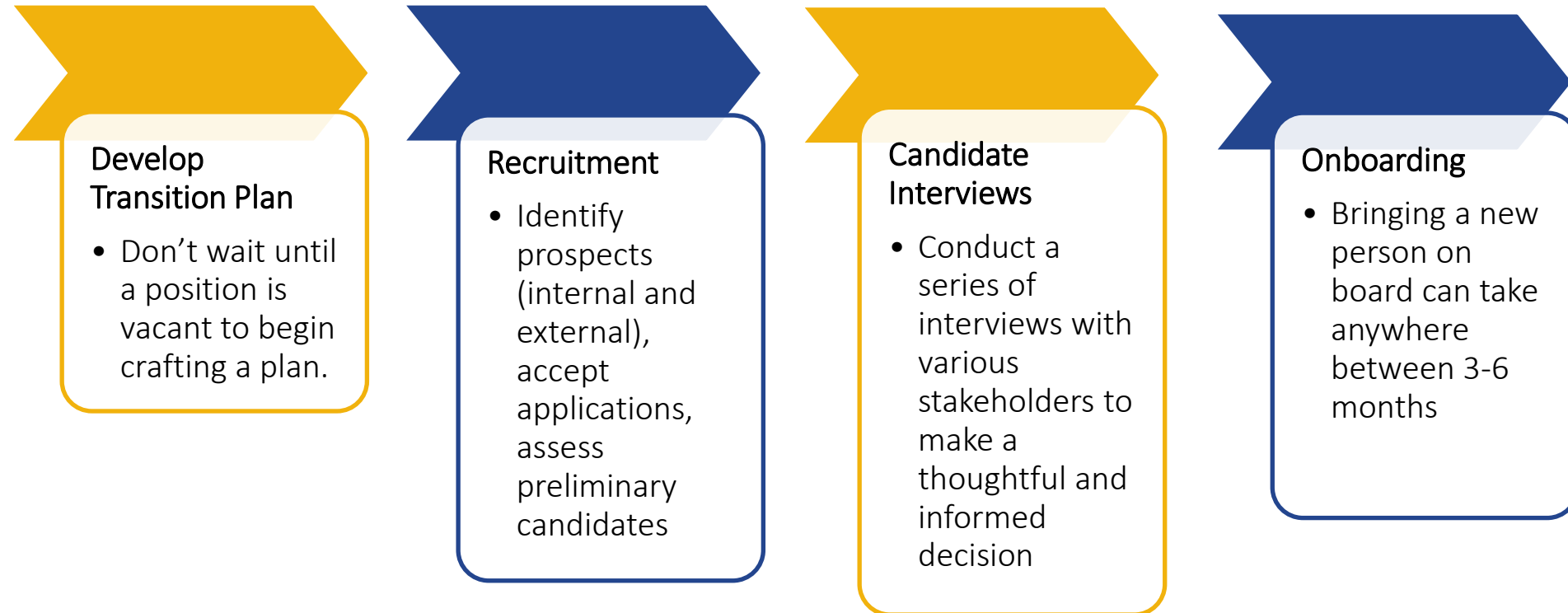
1. Evaluate your key employees. What are their strengths and weaknesses?
2. Identify key employees and positions. We're not just talking about those high-potential employees.
3. Don't just look at the present, but at future leadership roles and objectives.
4. Plan for individual development.
5. Plan for positions you can't fill internally.
6. Take a good look at your diversity pipeline.
7. Identify emergency positions.
8. Align board to the vision as executive transition plan is crafted.

Important Steps

1. Transfer knowledge and experience from the top.
2. Strengthen leadership peer relationships.
3. Provide needed cross-departmental learning and exposure.
4. Offer executive coaching.
5. Include more leaders in succession planning.
6. Provide mentoring support for new managers.
7. Assess talent.



Transition Timeline



Board Succession Planning Why Should We Care?



An effective board, committed to a purpose and skilled in governance and guided by an effective vision, is perhaps the greatest asset of a not-for-profit organization.

Creating a Succession Plan:

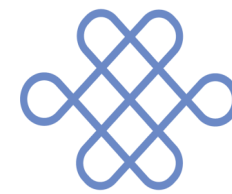
For Your Board



1. List the member qualities that the board needs in order to operate effectively.
2. Identify prospective board members who have these qualities and can best fill the role.
3. Balance board member qualities required for current goals – consider the changing needs of the organization.
4. How will the qualities of each prospective board member influence the rest of the board team?

Wrap Up & Questions

1. Develop succession plans. Don't wait until the need for a leader – either in a board chair, a CEO or a key staff member is obvious!
2. Make sure the organization understands and nurtures each employee's and board member's unique talents and potential.
3. Succession planning takes time – anywhere between 6 months to 2 years.
4. Ensure that executives make the necessary succession plan decisions through group discussion and review sessions.

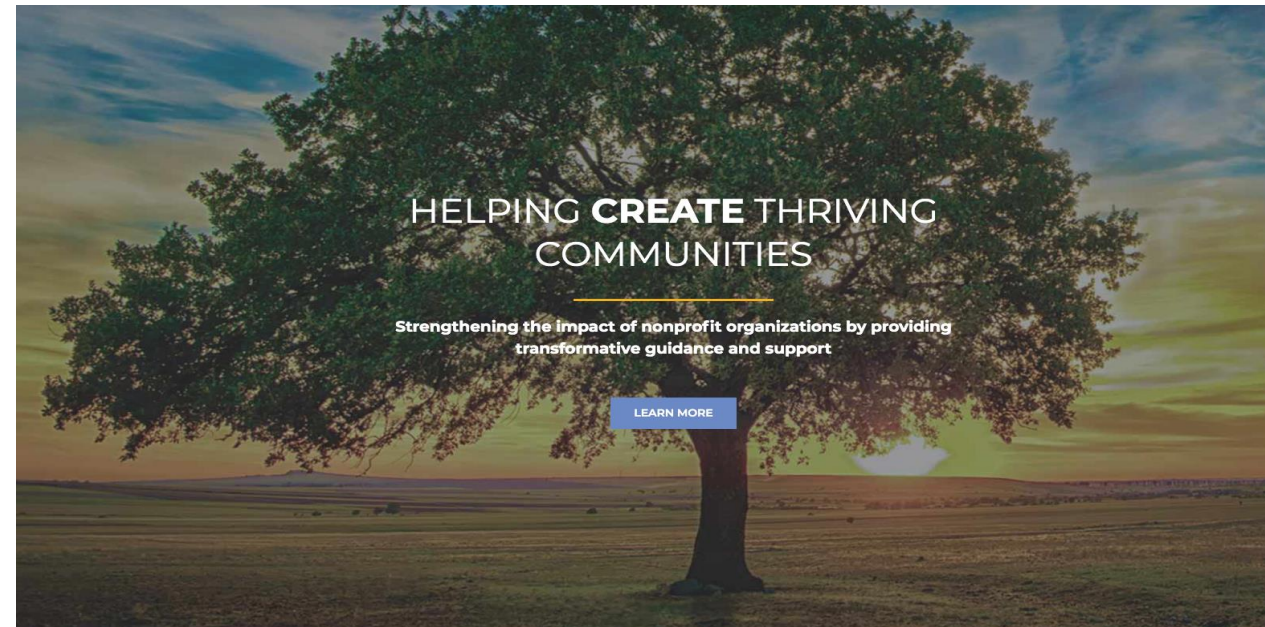


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About The Strategy Group

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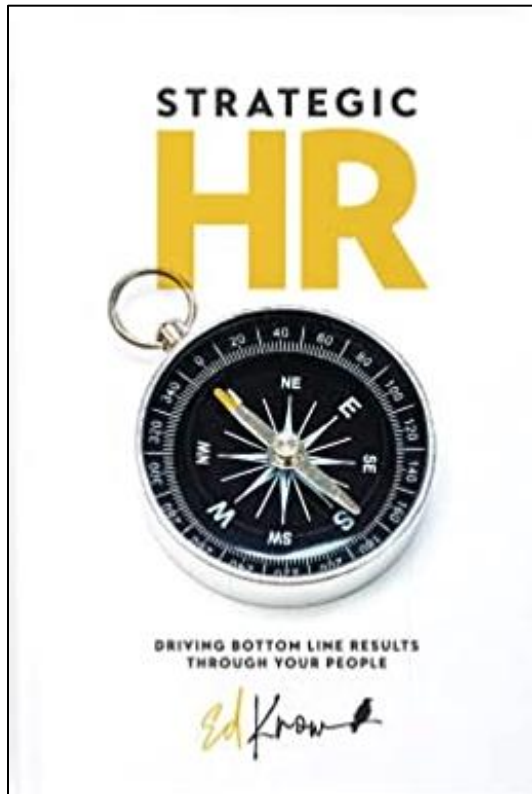


You will receive an email with a link to today's presentation that will include the video and the slides.

If we can help you with your succession planning, please reach out to us and set up a time to talk:

[https://calendly.com/dwhertz/time-with-debra.](https://calendly.com/dwhertz/time-with-debra)

More About Ed



Ed Krow 

Buy Ed's book –
Strategic HR:

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<https://www.amazon.com/gp/product/1734223715/>

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