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The Center for Civic Education

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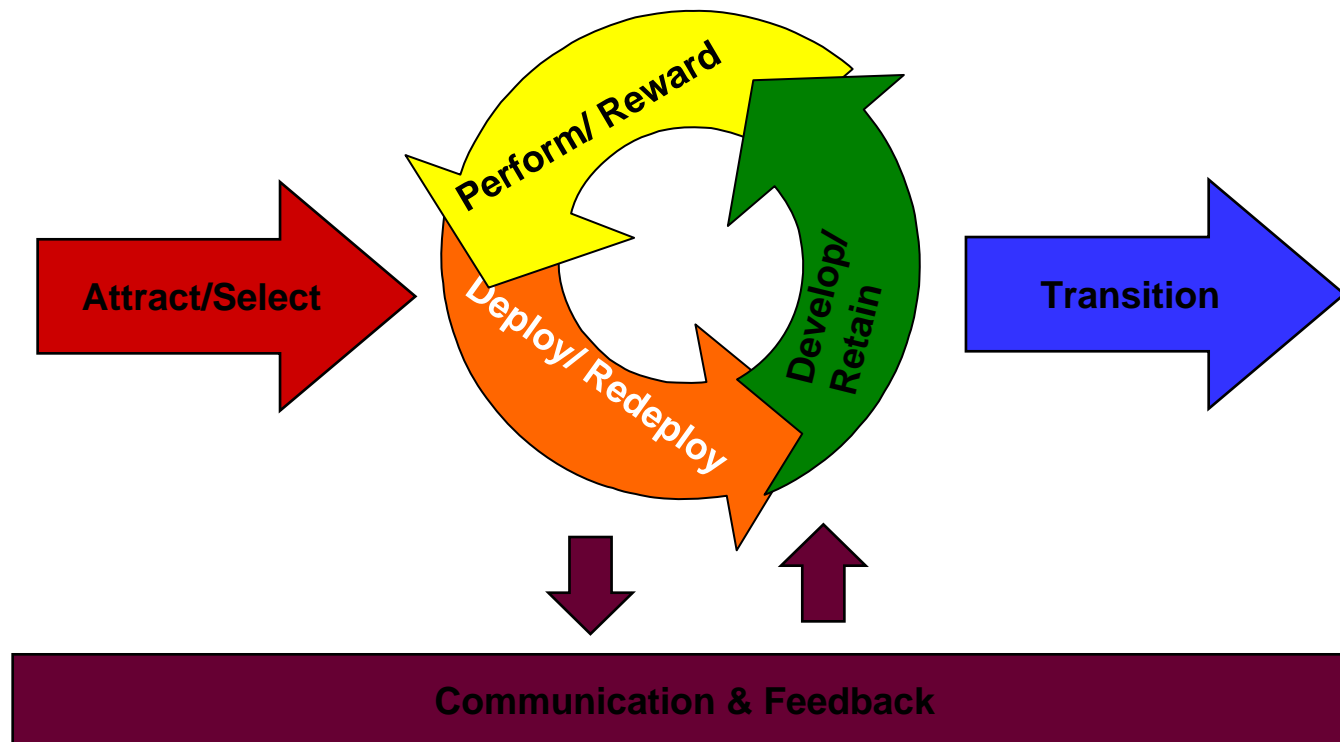
NONPROFIT
Partnerships
&
Collaborations

Local Resources for Succession Planning

Thursday, December 7, 2006 . 8:00 to 11:00 am
Maxine Goodman Levin College of Urban Affairs



People Management Life Cycle



Why Does This HR Stuff Matter?

It impacts your ability to:

- Retain good people
- Have motivated and satisfied employees
- Have employees focused on the right things
- Attract talent

This impacts your ability to achieve your mission

Benefits to having a succession plan

For the Organization:

- Identifies future leaders
- Ensures we have the right people in place

For Management:

- Ensures the "right person" is in the right role
- Identifies potential "risks" within the organization
- More effectively manage changes of key personnel with stakeholders

For the Individual:

- Identify skill gaps and manage development
- Motivates individuals by stretching their abilities
- Assists in allowing the individual to understand where they currently fit within the organization



People Management Lifecycle

Starting Point: Linking Strategy to Your HR Processes

Example

Environmental Drivers - SWOT	Large companies are leaving
Strategy	Fundraise in middle market
Imperatives	Target new businesses
To Do List	Work with chamber of commerce to introduce organization
Measures	Attend chamber of commerce meetings monthly and present
Priority	A
Who's Responsible	Director Development



Tying a Job to Strategy

Organizational Strategy

Role

To Do

Middle Market Expansion

Fundraise

Segment Market Call on 5 businesses per month

Visibility in the Community

**Community Relations
Media Relations**

**Meet Chamber of commerce Leads
Present at One CC Meeting**

**Job = Summation of Roles
VP of Development**



Annual Goals

Succession planning process-basic steps

**Assess
Organization**

Identify the critical roles and skills required to meet future needs

**Assess
Employees**

Assess employees and identify potential successors for critical roles

**Develop
Employees**

Determine if skill development is required to prepare employee for future role

**Manage placement
&
Recruit Employees**

Plan recruitment and manage placement of identified candidates

Assess Organization



- Identify the roles that will be included in your succession plan.

- For each key role prepare position descriptions including required skills, education and experience

- Standard Roles required:
 - Executive Director or CEO/President
 - Program Management
 - Development Lead
 - Finance/Administrative Lead

Assess Organization

Assess
Organization

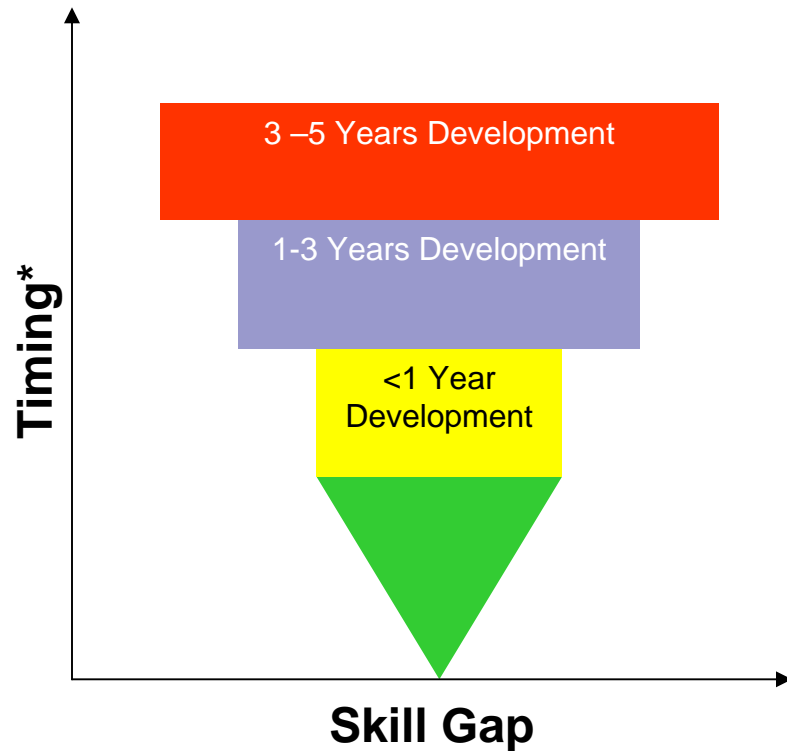
- Other key roles should be identified based on the risk profile of the role. If there is a risk to service levels, include it in the plan
- Evaluate your current team and identify the “positions” that could fill the job.
- Communicate the program to all incumbents on the program.
- Ensure:
 - Incumbents are involved fully in the planning process
 - Expectations and perceived promises of future career progression are managed carefully

Concerns

Assess
Organization

- Sense of being replaced held by current staff about oneself and others
- Employees content with current situation and not desiring change
- Allowing for employee learning curves, i.e., errors
- Providing the correct message internally and externally
- Board and staff buy-in
- Time and resources
- Attention to diversity, EEOC, and other compliance issues

Readiness Assessment



- Readiness Assessment – a perceived knowledge/skill gap that needs to be “bridged” for the individual to perform the job
- The larger the timing gap, the more training and development that will be required
- Preparation time is critical and gap sizes need to be realistic and managed

Develop Employees



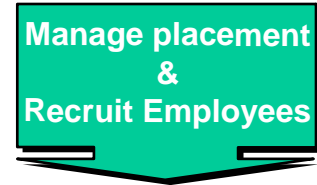
Develop
Employees

- Ensure people targeted for leadership are gaining the right experience and skills. Arrange periodic job rotations, job shadowing, task force or projects to stretch current skills.
- No promises should be made about future roles for your staff.
- Individuals should receive the appropriate messages regarding their future:
 - You are a valued member of the organization
 - You are demonstrating strong leadership potential
 - With the right skill-building and experiences, you could be one of the future leaders of this organization
 - We need to make sure you get the right experiences in your current position, while you build the skills necessary for the next one

Manage Placement & Recruit Employees

Evaluating the Pipeline of Candidates – Key Factors

- Depth
 - The pipeline should include 3 potential immediate successors
- Diversity – encourage looking at the make-up of the individuals in the pipeline.
 - Does the pipeline resemble the overall make-up of the organization?
 - If the pipeline is not diverse, is there an opportunity to manage it?
- The “Hit by a Bus” scenario
 - Need to have interim leadership identified



Manage Placement and Recruit Employees

Consider these factors as you fill an opening:

- When a senior level position becomes available look to your succession plan
- If the talent *does not* exist internally, use your network to source people
- Consider a recruiter if...
 - You can afford one
 - The role is difficult to fill
 - The position is high risk if not filled quickly