



Millennials and Beyond:

**Preparing Your Organization for Succession
Planning, Board Recruitment, and Talent
Development**

Key Takeaways

1. Leave with some clear, actionable steps for improving your organization's current planning around succession for key positions.
2. Have some laughs and address current questions and challenges your organization may be dealing with in the area of succession planning, board recruitment, and talent development.
3. Share some best practices and milestones that your organization can use as a gauge for progress, no matter where you currently are in terms of your planning.



**“Our succession plan is that
we don’t talk about it!”**

From Boston Globe Article: [Nonprofits Hungry for New Leadership](#)

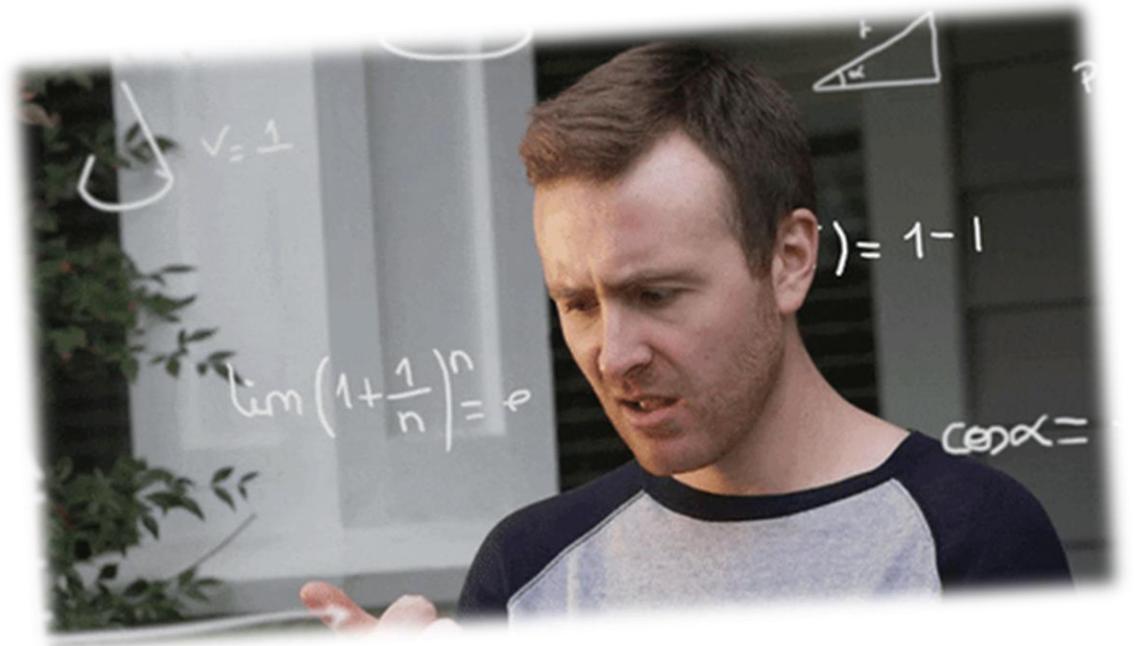
The Perception: Leadership Change is a **HUGE RISK**

- Replacing a proven, charismatic leader – **what happens to all of those relationships (especially with funders or customers!)?**
- Our organization's identity is so closely tied to our leadership – an especially common issue with nonprofits or businesses that are still led by their founders.



What's Your Plan? Key Steps to Having a Clear Strategy for Succession

1. Figure out what your organization needs! This should include input from your current leadership and staff:
 - a. What qualities and skills are critical for their position?
 - b. **What opportunities and challenges are on the horizon for your organization?**
 - c. **How much time do we have before any transition?**
2. Get your board or company leadership involved and engaged **before** dealing with succession becomes a crisis.
3. **“Build your bench”** – Identify emerging leaders in your organization or potential candidates could fill key roles.



Easing Into Succession Planning: Some Quick First Steps for Momentum

1. Take stock of your current succession plan for your Executive Director/CEO position and any other key staff positions. **Don't have a plan at all?** Better to know **NOW** and start to develop one than waiting until you're in full crisis mode.
2. Do you have an accurate picture of what you're looking for? Review and update any job descriptions and the qualities and skills your ideal candidate would have.
3. **Who's already on our team?** Do we already have some of the right people on board with potential who just need the right training and leadership development? **Internal development and advancement is a critical part of culture and your ability to meet your organizational goals.**

A Special Case: Succession Planning for Nonprofit Board Members

- Who do you need on your board and/or which board members do you need to replace?
- You need to plan not only for board recruitment, but also succession planning for key board roles:
 - Your Board Chair
 - Your Officers (Secretary, Treasurer, Vice-Chair)
 - Committee Chairs
- Your board is and will ALWAYS be a work in progress.



Prioritize Your Recruitment

- Which one of these three questions do you think is going to yield a better recruitment strategy / approach?
 - **Hey, do you know anyone who might be interested in serving on our board?**
 - We're looking for someone connected with **Company X** to serve on our board because of their company volunteer programs.
 - Our organization could really use a board member with experience in PR and Internet marketing to help us improve our communications and social media strategy.
- Do you know anyone who'd be a good fit?*



Some Board Recruitment Resources

- [BoardSource](#) has an excellent board recruitment template and other resources available focused on board governance and self-assessment.
- [Joan Garry's blog](#) has a whole series of posts, free resources, assessments, and great writing about board development, recruitment, and governance.
 - [How to Select First-Rate Board Members](#)
 - [Board Assessment Tool](#)
- [Leading With Intent](#) is a survey conducted by BoardSource each year that has great information about nonprofit board recruitment trends, governance practices, and information that can help you compare your performance and policies to other organizations.

Defini

Optimizer
travelling together

The Planner

Understand RC

2. PROBLEMS / PAINS

Which problems do you solve for your customer?
There could be more than one, explore different ones.
eg. existing solar solutions for private houses are not always
a good investment (1).

X
TOO MANY
POINTS FOR
COMPARISON

(FI) Hard to
coordinate
booking for

TOO MANY
TABS

“**Culture** eats
strategy for
breakfast.”

Are You In The Race For Talent?



“How’s your mother?”

“She’s on her way out.”

**“We all are.
Act accordingly.”**

-Scene from The Departed

What We Can Learn from Broadway Shows, Professional Sports, and Our State Government

“Our grants manager was tragically killed in a car wreck in the same month in which we had 20 final reports due for federal grants. I have two great young employees...either of which may be my successor. Neither had the whole story on how these grants intertwined. **I grew the agency from our first grant...how can I download all these important details so they don’t have a mess when I am gone?”**

Common Obstacles to Effective Talent Development

- **Money & Access to Resources**
- **Not Enough Time / Competing Priorities**
- **Lack of Information & Awareness**

Solutions: Money & Access to Resources

- As part of your grant applications to funders, you can certainly add in professional development and training costs to your budget. **A compelling case can be made to funders that those funds will help achieve the other outcomes associated with a grant application.**
- Professional development doesn't always need to be **costly or expensive** – knowing about organizations that offer high-quality training for nonprofits is crucial. **If you are a smaller non-profit or startup, scholarships and discounts may be available for you.**
- Online learning platforms have become more affordable and more accessible than ever before: Lynda (LinkedIn), Udemy, Coursera, Nonprofit Learning Lab, TechSoup, NTEN (Nonprofit Technology Network), Top Nonprofits, and many others are available.

Solutions: Not Enough Time & Competing Priorities

- **Your employees, volunteers, and board members are your most important asset as an organization.** Building in designated time for assessment, coaching, and staff or board development into your official calendar is a MUST.
- **Quality and focus can be more important than quantity when it comes to talent development.** Regular check-ins (weekly/monthly) with employees should incorporate individual talent development goals with specific targets and feedback/recognition for progress.

Solutions: Lack of Information or Awareness

- Sign up for relevant updates about training opportunities from key providers who focus on the areas your staff needs development in: HR, financial management, technology training, social media, event planning, project management. **You DON'T need to have internal, in-house expertise; you DO need to connect your employees to the right training opportunities and information.**
- Encourage your board and staff to share relevant information about opportunities for development: upcoming trainings, recommendations for professional development books, compliance and policy changes, and materials highlighting best practices and innovative ideas. **Your end goal should be to create a culture of continuous learning and development.**

Questions? Want to Follow Up?



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