



Recruiting excellence for the nonprofit sector

Succession Planning

CFGP Philanthropy Forum National Philanthropy Day

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1. Value of succession planning
2. Barriers to succession planning
3. The roles of the board and staff in succession planning
4. Starting the conversation...

A deliberate and systematic effort by an organization to:

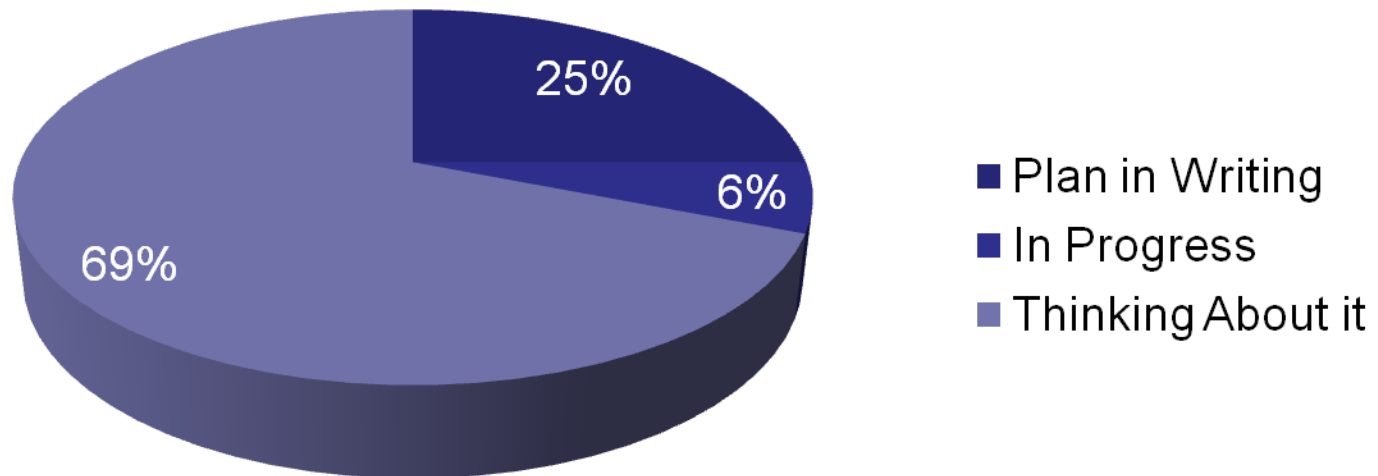
- ensure leadership continuity in key positions,
- retain and develop intellectual and knowledge capital
for the future,
- and encourage individual advancement.

33% of paid employees in the nonprofit sector hold professional or managerial positions compared with just 10% in the for-profit sector



Recent survey amongst 17 nonprofits across Canada, 69% do not have a written succession plan/policy

Interview Results



Continued survival depends on the “*right people*”.

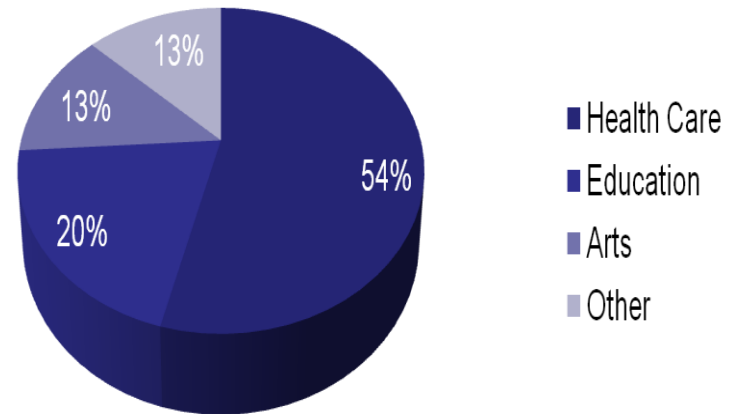
A succession plan:

- Establishes and communicates career paths to each individual in an organization
- Establishes development and training plans
- Contributes to a healthy staff retention plan
 - To provide increased opportunities for "high potential" workers.
 - To identify "replacement needs" as a means of targeting necessary training, employee education, and employee development.
 - To increase the talent pool of promotable employees

Amongst 17 nonprofits across Canada 5 key barriers to succession planning were identified

Barriers Identified

% of Participants by Sector



Roles & Responsibilities

Board

- Ensure the ED has a succession plan in place
- Monitor Annually
- Ensure consensus around vision

Staff/ED

- Involve the board – introduce the discussion
- Build the succession plan, deep in organization
- Build future leaders
- Develop board procedures for succession

Homework/Operational Pieces:

1. Job description for every position
2. Task List for every position
3. Annualized Calendar
4. “Location of Everything” document
5. Critical Relationships
 - bookkeeper, payroll service
6. Fund Development
 - donor list
7. Provide for organizational redundancy – policy



Complete the annual calendar to document key events and activities

ED

- monthly reporting dates
- filing dates
- event dates
- board meetings, AGM



Staff

- audit preparation
- campaigns

**Whether we plan
or not, succession
is inevitable**

Three Ways to Look at Succession Planning

1. Emergency (Unplanned) Succession Plan (ESP)
2. Strategic leader development Plan (Planned)
3. Departure-defined Succession Policy

Staff Retention/Build your Team:

1. Attract the best team!
2. Help staff build strong external networks.
3. Be a mentor – identify prospective successors on your team and groom them.
3. Pay reasonable salaries and provide good benefits.
4. Ensure Profession Advancement budget supports succession
5. Encourage education in leadership skills



1. Succession planning should extend deep in your organization
2. Establish systems not individuals
3. Start the dialogue with the Emergency Succession Plan
4. Ensure a two-way conversation: staff and Board

Succession Planning

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