



Succession Planning Preparation

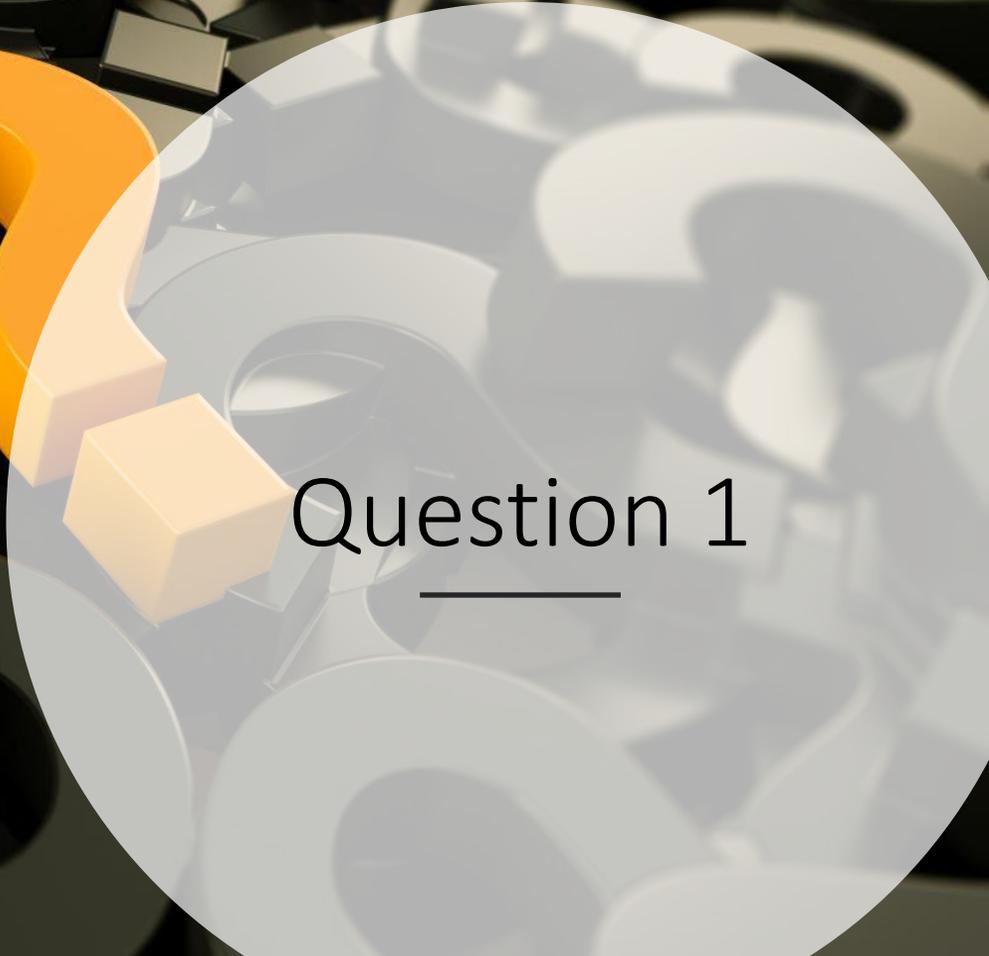
Created & Presented by:

Franklin Harris, Director of Human Resources &
Operations (Arden Wood)

Agenda

- Introduction
- What is Succession Planning?
- How to approach Succession Planning.
- Discuss In-person Succession Planning Workshop
- Q&A





Question 1

What is a Succession Plan?



125,058	154,568	95,054	124,500
125,487	56,845	97,511	125,000
124,000	110,000	99,011	154,000
150,000	150,000	99,216	95,000
35,000	101,090	101,684	154,200
	101,962		110,000
			89,000
			50,000
			700

Why do we succession plan?

To provide clarity and continuity of an organization's operation.

To identify important positions throughout an organization, including possible successors for these positions, and to prepare those successors through training and experience to step into leadership roles.

To help organizations avoid disruptions that can lead to loss of business or productivity.

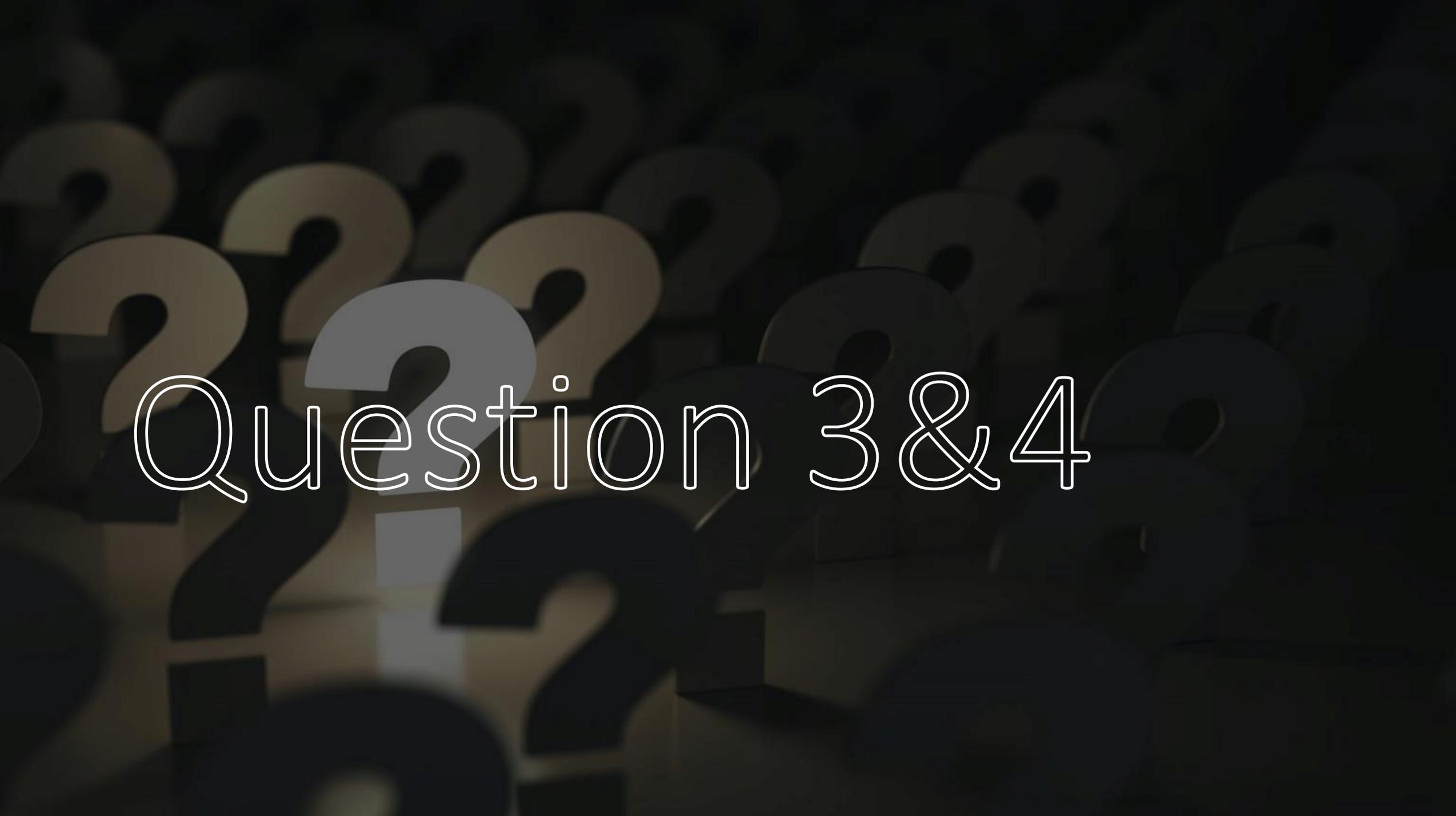
To enable organizations to take a strategic approach to leadership development and recruitment.



Question 2

The Process of Succession Planning



The background of the image is a dark, almost black, field filled with numerous question marks. The question marks are rendered in a light, muted brown or grey color and are scattered across the frame, some appearing larger and more prominent than others, creating a sense of depth and repetition. The overall effect is one of mystery and inquiry.

Question 3&4





Key
Positions
(Non-Profit)

Board Members

Chief Executive Officer / Executive Director

Chief Financial Officer

Director of Development

Director of Human Resources

Director of Christian Science Nursing

Key
Competencies

LEADING PEOPLE

LEADING CHANGE

EXERCISING BUSINESS JUDGEMENT

FUNDRAISING

Job Descriptions

A good job description should accurately reflect the duties and responsibilities of the position.

A job description should produce a realistic picture of a job and answer the question, “What does the person in the role actually do?”

A job description must contain the following components: job titles, job purpose, job duties and responsibilities, required qualifications, preferred qualifications and working conditions.

Abilities

The ability to build teamwork.

The ability to think strategically.

The ability to communicate.

The ability to motivate others.

The ability to develop others.

Identifying / Shortlisting Potential Successors

Determine

- Determine measurable criteria to evaluate each candidate's potential.

Determine

- Determine if the potential candidate is interested in the future role.

Develop

- Develop a talent development plan for each potential successor.

Follow

- Follow the candidate's progress



Customized Approach

How could you approach succession
planning? (Discussion)

Considerations
before
beginning to
Succession
Plan.

What is the goal of the succession plan?

Who will be involved in the pre-planning, planning, and implementation process?

How will you communicate this plan to your senior management team?

Who will lead the succession planning process?

How will you create *manageable* timelines?

What to expect in the in-person workshop

Introduction of the Succession Planning Template

Begin to understand the Succession Planning Template and how it can work for your organization.

Deep dive into the ED responsibility in the Succession Planning Process

Fill in parts of the Succession Plan

Q&A

Items needed for SPET In-Person Workshop

Succession Planning
Template

Job description for Key
positions (Important)

An open mind

Q&A