

You are receiving this new monthly e-publication as a subscriber to the Not-for-profit News. If this material is not of interest, you can unsubscribe at any time. Click on the Safe Unsubscribe link in the footer.



Frontline Perspectives

FOR NONPROFIT BOARD AND STAFF LEADERS

October
2017

Bryan Orander, president, Charitable Advisors



Next UP! Are You Preparing Future Leaders?

Every day, we are fortunate to work with nonprofits that are charting leadership transitions. To provide some perspective, so far this year Charitable Advisors has supported nine ED/CEO transitions, with several more at various levels of preparation. In addition, we are getting an increasing number of requests from associations about developing succession planning training for the leaders of their member nonprofits.

We see some recurring themes emerging that could help your organization prepare for your next leadership transition - planned or unplanned.

- A reluctance to acknowledge the inevitable
- Succession planning that just focuses on a written plan but doesn't engage people
- Internal candidates who have not received sufficient development or intentional development
- Multiple senior leaders in the same age cohort

A reluctance to acknowledge the inevitable - It is an awkward conversation for a nonprofit ED/CEO or a board chair to approach the other to initiate a conversation about succession planning. Use this article as an excuse to open the door to developing an "Emergency Succession Plan." You do not need to look very far to find an organization whose ED/CEO has recently been sidelined by an illness.

Succession planning that focuses on paper and ignores people - Have a discussion with the executive committee about who would do what if the staff leader was incapacitated or unavailable without notice. Think of it as a brief annual fire drill to ensure everyone knows where written plans exist and knows the key people involved and steps they would take. You are much more likely to weather the unexpected if everyone is clear on their roles.

Internal candidates who have not received intentional development - Just last week, I was sitting in a meeting where two people shared that they were informed that their executive directors viewed them as potential successors. This was after they had resigned to move to new jobs. While it is the board's role to choose the next ED/CEO, and the ED/CEO's role to develop and promote staff - this should be an active partnership. Board members should know the senior staff and encourage efforts to develop and broaden their skills and experience. The ED/CEO should keep the board in the loop about staff he or she sees as having great potential and what steps are being taken to develop them. In addition, board and senior staff should be clear about what the process will be to identify the next leader when a transition becomes necessary - most commonly to open a search and encourage internal candidates.

Many leaders in the same age cohort - So many organizations have a core of long-term leaders and staff in their late 50s to early 60s. This generation brings vast experience and value to their organizations but will be leaving in the near future. Fortunately, you can bet that three 60-year-olds will not retire at the same age or same time, but creating a work environment where it is acceptable to talk about retirement plans, timelines, and potential part-time roles allows departures to be staggered and younger staff to see a clearer path into leadership.

Your next step - If your organization doesn't have an Emergency Succession Plan, e-mail Bryan at Bryan@CharitableAdvisors.com for a simple template that will get you started.



QUICK TIP

Part II - Next UP! Are You Preparing Future BOARD Leaders

In many regards, planning for succession of board leaders is just as difficult as planning for the succession of staff leaders. Though we always hope to know well in advance when a board leader will be leaving, in reality careers, family or illness can often throw well-made plans off course. In addition, new board leaders need time to learn about the organization, the board and staff team, and their role. Not to mention, learn all this on a part-time, volunteer schedule.



Here is a beginning list of strategies to take to your next Executive Committee or Governance Committee meeting for discussion.

Key strategies

- **Identifying leaders from within:**
Watch the board work and observe those people who bring the passion for your efforts along with leadership skills, organizational skills, and discipline to get things done.
- **Replicating leaders:**

Each board officer and committee chair should be challenged to develop his or her own successor and have that person ready before they are needed.

- **Recruiting leaders:**

As the governance committee is recruiting new candidates, they should be looking for members who bring leadership experience and skills from other boards or a similar team environment.

- **Creating leadership roles:**

Whether heading a committee, special event, a task force, or other short-term effort, look for ways that board members and other volunteers can develop and showcase their leadership skills.

- **Learning from participating:**

Though conventional wisdom suggests that every conversation or meeting have the fewest possible people involved, open the doors of most board and committee conversations to any board member who is interested with the hope that they will develop new interests and learn more about how things work within your organization.

Share your board questions and ideas with us at Bryan@CharitableAdvisors.com so we can share them in a future "Quick Tip".



LEARNING OPPORTUNITIES



This is a repeat from last month because there are so many great events and it is not too late to choose a new learning opportunity for yourself, a board leader, or staff member.

Attend an annual conference this fall

Fall is a great time to get out of the office and learn with your peers. Many nonprofits have a national office and conference to attend but there are many other options and alternatives.

Think about taking a newer staff member or board member along, if you can. Some are local and one day, others are multiple days and across the country.

- [BoardSource](#)

Annual conference in Seattle in mid-October.

- [Alliance for Nonprofit Management](#)

Nonprofit Capacity Builders Conference in Michigan in mid-November.

- [Indiana Youth Institute](#)
All about youth and the people who serve them. Annual conference in late November.
- [Indiana Evaluation Association Conference](#)
October 20, 2017
- [Center for Nonprofit Excellence, Louisville](#)
Celebrating Excellence Conference in late October.
- [Flywheel Social Enterprise Hub, Cincinnati](#)
Watch for its next gathering.
- [Prosperity Indiana Summit](#)
The intersection of community health and community development. January 2018.



YOUR READING LIST

"Drive" and "Ideal Team Player"

Daniel H. Pink. 2009. "Drive: The Surprising Truth About What Motivates Us" by (Riverhead Books, 256 pages)

Patrick M. Lencioni. 2016. "The Ideal Team Player: How to Recognize and Cultivate The Three Essential Virtues." (Jossey-Bass, 240 pages)

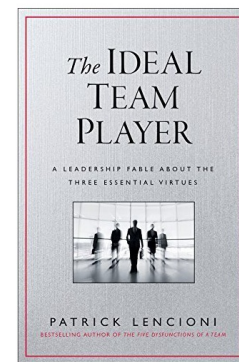
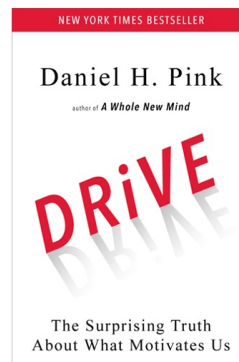
Are you in that mode of wanting to create a great workplace for your team and really engage people in your efforts? Here are a couple books to get your creativity flowing.

In "Drive," Pink offers that we are all motivated by three key desires - autonomy, mastery and purpose. Can you summarize what he offers about these desires in three sentences?

In "The Ideal Team Player," Lencioni (best known for Five Dysfunctions of a Team) suggests that our hiring and development practices should be focused on three key characteristics - humility, hunger, and people smarts. He weaves the characteristics into a story that is easy to translate to your situation.

Let me know what you are reading.

Bryan Orander
Bryan@CharitableAdvisors.com



SELECTED CHARITABLE ADVISORS NONPROFIT RESOURCES

[Nonprofit Job Board](#)

[Real estate to lease or for events/meetings](#)

[How to place a Job ad](#)

[2016 Charitable Advisors Nonprofit Salary Survey](#)

I started Charitable Advisors in 2000 with a vision to offer more than traditional consulting services and to become a connector, advocate, and problem solver for the nonprofit sector. This approach has made Charitable Advisors a critical component of the central Indiana nonprofit infrastructure. Over the past 6-7 years, we have supported more nonprofits through leadership transitions and retirements than any other area firm. Nonprofits post 1,000 job

openings each year on our nonprofit job board. We research and publish the local nonprofit salary survey and we keep thousands of nonprofit leaders informed each week through the Indianapolis Not-for-profit News e-mail newsletter.

Contact me if your organization is preparing for its next strategic planning cycle, envisioning a new focus on board development, or preparing for a planned or unexpected leadership transition.

Bryan Orander, President - Charitable Advisors



STAY CONNECTED

