

NAVIGATING LEADERSHIP DEVELOPMENT SUCCESSION PLANNING: STRATEGIES FOR SUSTAINABLE NONPROFIT GROWTH

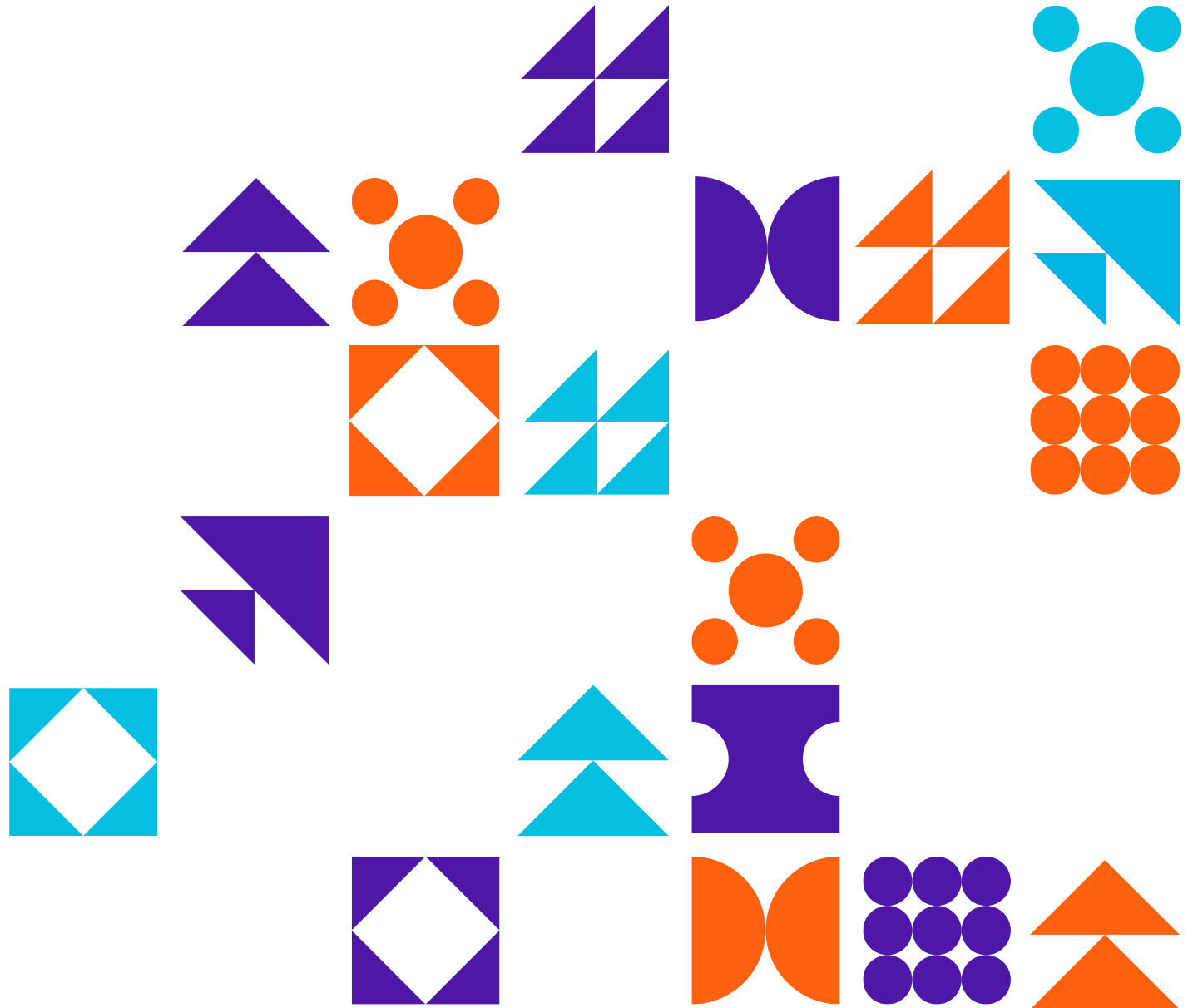
Regions 1 and 7 Leadership Meeting
(Albuquerque, NM)

David C. Doan | PhD, MBA, RN, BCMAS, PMC-II, PMP, CSM, CSPO

VP of Operations/President-Elect

PMI Los Angeles

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Discussion Topics



Welcome!

“Passion + Consistency = Success”— Lilla Liptak

1

5 min

Leadership Development Succession Planning in Nonprofit Organizations

2

10 min

Strategies and Recommendations for Leadership Development Succession Planning

3

5 min

Leadership Development Succession Planning Readiness

4

35 min

SIGMA’s Six-Step Succession Planning Process

5

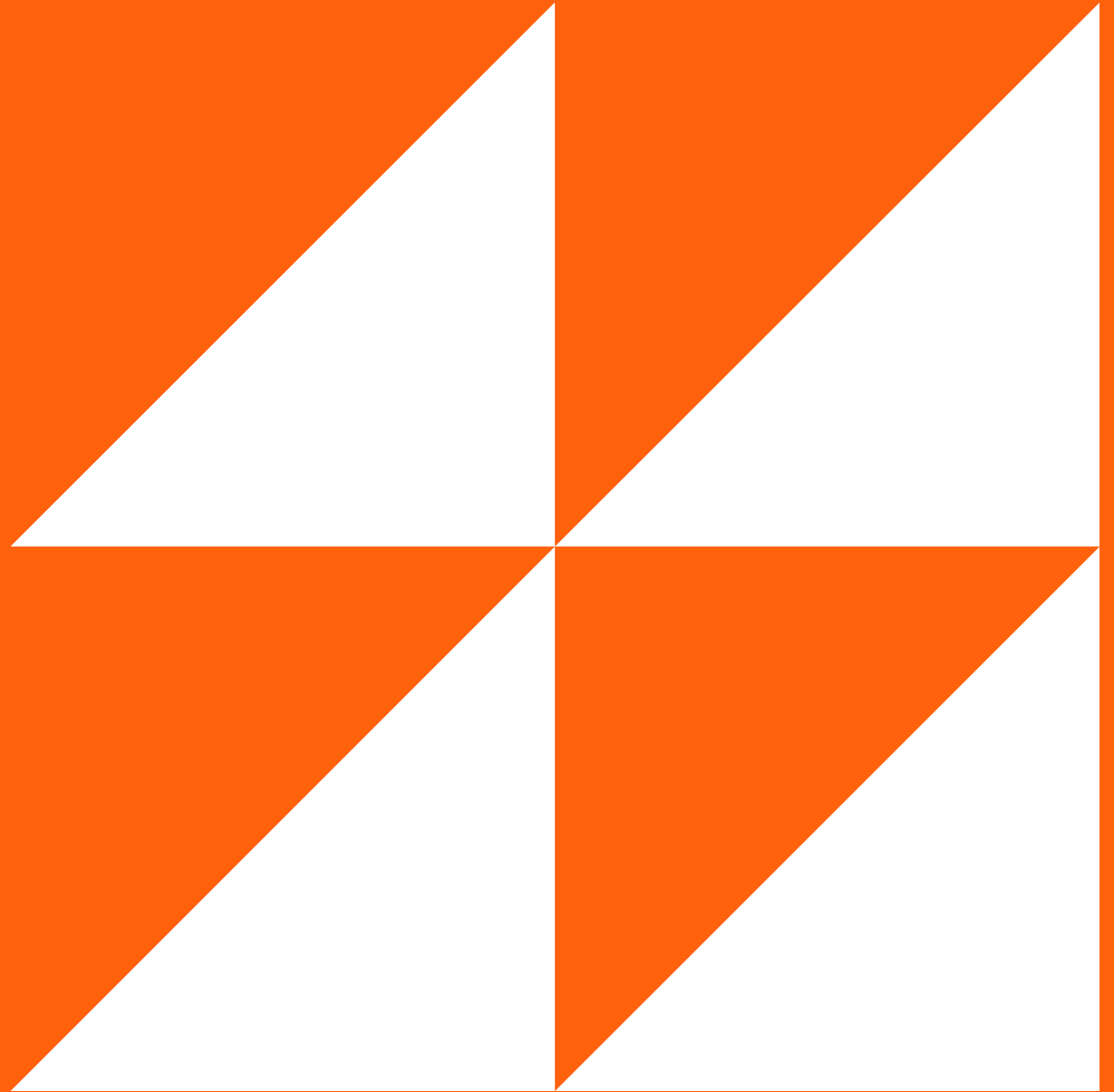
5 min

PMI-LA Leadership Development Program

Learning Objectives

1. Understand the importance of leadership development succession planning for nonprofit sustainability and resilience.
2. Explore key strategies for engaging board and staff in intentional transition management.
3. Learn how to identify critical roles, build success profiles, and nominate successors using SIGMA's 6-Step Succession Planning Process.
4. Discover best practices for developing talent, cross-training staff, and implementing emergency succession plans.
5. Gain insights into supporting leaders of color during transitions, drawing from research and recommendations from the Building Movement Project.
6. Access a comprehensive toolkit of 22 templates and references to guide effective succession planning and emergency preparedness.

LEADERSHIP DEVELOPMENT SUCCESSION PLANNING IN NONPROFIT ORGANIZATIONS



Why plan for succession?

- Succession planning helps organizations to plan for the future.
- A robust succession plan offers employees a chance to develop their skills while providing leaders with a clear path for the stability of their organization.
- Despite knowing how important succession planning is, less than 1 in 4 boards have a formal plan in place.



Why succession planning is challenging for nonprofit organizations (1)

Leadership succession planning can be particularly challenging for nonprofit organizations due to several unique factors

- 1. Resource Constraints:** Nonprofits often operate with limited financial and human resources, making it difficult to invest in comprehensive succession planning and leadership development programs.
- 2. Reluctance to Address Succession:** Board members and current leaders might be reluctant to discuss succession planning due to discomfort with addressing the potential departure of key individuals, particularly if those individuals are founders or long-tenured leaders.
- 3. Dependence on Key Individuals:** Nonprofits can become heavily reliant on a few key leaders, especially presidents or charismatic leaders whose departure might create a significant void. This dependency can hinder the planning process.
- 4. Lack of Formal Processes:** Many nonprofits do not have formalized processes for identifying and grooming future leaders. Without structured systems in place, succession planning can be inconsistent and ad hoc.
- 5. Board Dynamics:** Nonprofit boards may lack the experience or expertise needed to effectively oversee succession planning. Board members often come from diverse backgrounds and may not fully understand the intricacies of leadership transitions in the nonprofit sector.

Why succession planning is challenging for nonprofit organizations (2)

Leadership succession planning can be particularly challenging for nonprofit organizations due to several unique factors

6. **Limited Talent Pool:** Nonprofits may struggle to attract and retain talent due to lower salaries and fewer career advancement opportunities (or due to an all-volunteer boards) compared to the for-profit sector. This limits the internal pool of potential successors.
7. **Cultural Factors:** The culture of the organization may not prioritize or value succession planning. Nonprofits focused on immediate mission-driven work might see succession planning as a lower priority.
8. **Communication Challenges:** Open and honest communication about succession can be difficult. Leaders may fear that discussing succession will create uncertainty or signal instability to staff, donors, and other stakeholders.
9. **Long-Term President Syndrome:** In organizations where a long-term president (where there is no term limit) is still involved, succession planning can be particularly challenging. Long-term presidents may be reluctant to step aside or may struggle to envision the organization without their direct involvement.
10. **Diverse Stakeholder Interests:** Nonprofits often have a wide range of stakeholders with varying interests and expectations. Balancing these interests during the succession planning process can be complex and politically sensitive.

Why succession planning is challenging for nonprofit organizations (3)

Leadership succession planning can be particularly challenging for nonprofit organizations due to several unique factors

- Addressing these challenges requires intentional effort, strategic thinking, and a commitment to long-term organizational health.
- Developing a culture that values leadership development and planning, engaging the board effectively, and securing the necessary resources are critical steps in overcoming these obstacles.

Succession Planning is Crucial for Nonprofit Organizations (1 of 2)

- **Leadership Continuity:** Ensures that the organization has capable leaders ready to step in when key positions become vacant. This continuity is vital for maintaining momentum and achieving long-term goals.
- **Risk Management:** Helps mitigate risks associated with sudden departures of key leaders. Without a plan, an unexpected vacancy can disrupt operations and undermine stakeholder confidence.
- **Organizational Stability:** Supports the stability and resilience of the organization by preparing for smooth transitions. This stability is essential for sustaining donor trust and community support.
- **Talent Development:** Encourages the identification and development of internal talent. By focusing on succession planning, nonprofits can invest in the professional growth of their staff, ensuring a pool of qualified candidates for future leadership roles.

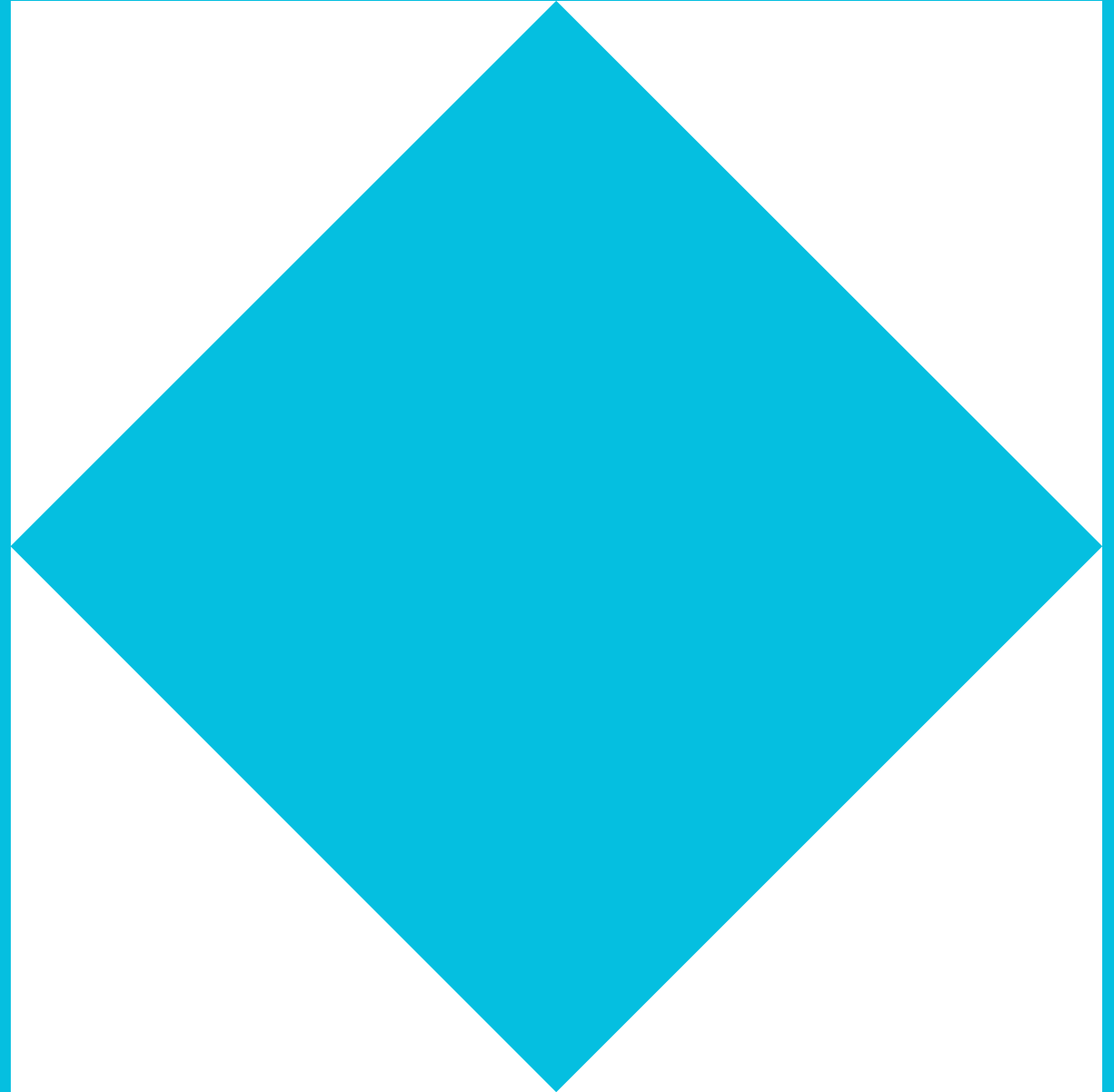
Succession Planning is Crucial for Nonprofit Organizations (2 of 2)

- **Strategic Alignment:** Aligns leadership development with the organization's strategic goals. It ensures that future leaders are prepared to advance the mission and vision of the nonprofit.
- **Board Engagement:** Engages the board of directors in planning for the organization's future. This involvement helps the board understand the importance of leadership continuity and their role in supporting it.
- **Sustainability:** Enhances the sustainability of the organization by ensuring that it can continue to operate effectively regardless of changes in leadership. This sustainability is critical for long-term impact and mission fulfillment.
- By proactively planning for leadership transitions, nonprofits can ensure they remain resilient, effective, and capable of achieving their missions even in the face of inevitable changes in personnel.

Three Ways of Thinking About Succession Planning

- Succession planning can take on different forms and be completed for various situations.
- Three scenarios, in particular, are recommended for all organizations, and are defined in this toolkit:
 - **Emergency Succession Planning** – A process that is in place in the event the president suddenly departs – either permanently or for an extended period of time (i.e., longer than three months). This ensures that key leadership and administrative functions can continue without disruption in the event of an unplanned, temporary absence of an administrator.
 - **Departure-Defined Succession Planning** – A process that is in place for a future planned retirement or permanent departure of the executive. This method is recommended when a long-term leader has announced his or her departure date two or more years in advance. It includes identifying the organization’s goals going forward; determining which tools a successor will need to have in his or her skill set to achieve those goals; and devoting significant attention to building the capacity of the board, managers, and systems to sustain funding and programs beyond the current executive’s tenure.
 - **Strategic Leader Development** – A process that promotes ongoing leadership development for talent within the organization. This is an ongoing practice based on defining an organization’s strategic vision, identifying the leadership and managerial skills necessary to carry out that vision, and recruiting and maintaining talented individuals who have or who can develop those skills.

STRATEGIES AND RECOMMENDATIONS FOR LEADERSHIP SUCCESSION PLANNING PROGRAM



Strategies and Recommendations in Leadership Succession Planning (1)

1. Identify Potential Leaders Early:

- a. Begin identifying potential leadership candidates well in advance. Encourage active members to express their interest in leadership roles.
- b. Implement a mentorship program where experienced leaders guide potential successors and help them understand the responsibilities of board positions.

2. Skill Development Programs:

- a. Offer training sessions, workshops, and certifications specifically aimed at developing leadership and project management skills among interested members.
- b. Consider partnering with local educational institutions or professionals to provide specialized training.

3. Recruitment Strategies:

- a. Establish a consistent recruitment process for leadership positions. Create a detailed job description for each role, outlining expectations and responsibilities.
- b. Develop a recruitment committee responsible for identifying and engaging potential candidates.

4. Demystify Leadership Positions:

- a. Provide clear and concise descriptions of each leadership role, including the time commitment, skills required, and benefits.
- b. Host informational sessions where current and past board members share their experiences and insights about serving on the board.

Strategies and Recommendations in Leadership Succession Planning (2)

5. Gradual Onboarding and Transition:

- a. Implement a structured onboarding program for newly elected leaders. This program should include a comprehensive orientation to the organization and their specific roles.
- b. Ensure a transition period where outgoing and incoming board members work together to ensure a smooth handover of responsibilities.

6. Staggered Elections:

- a. Adjust the election timeline to stagger the turnover of board members. This can help prevent a sudden leadership gap and provide continuity.
- b. Consider having elections for different positions at different times throughout the year.

7. Regular Leadership Training and Workshops:

- a. Hold regular leadership development workshops and seminars throughout the year. These sessions can focus on topics such as governance, strategic planning, and leadership skills.
- b. Encourage board members to attend relevant external leadership training programs.

8. Succession Planning Committee:

- a. Create a dedicated committee responsible for overseeing the succession planning process. This committee can evaluate the progress, identify gaps, and make necessary adjustments.

Strategies and Recommendations in Leadership Succession Planning (5)

9. Feedback Mechanisms:

- a. Establish a feedback mechanism where members can provide input and suggestions on leadership development and succession planning.
- b. Use surveys and interviews to gather insights and continuously improve the process.

10. Promote Inclusivity and Diversity:

- a. Ensure that your succession planning efforts are inclusive and promote diversity in leadership roles.
- b. Encourage members from different backgrounds and experiences to participate and take on leadership roles.

11. Recognize and Reward:

- a. Recognize the contributions of board members and volunteers, both past and present. Celebrate their achievements and showcase their success stories to inspire others.

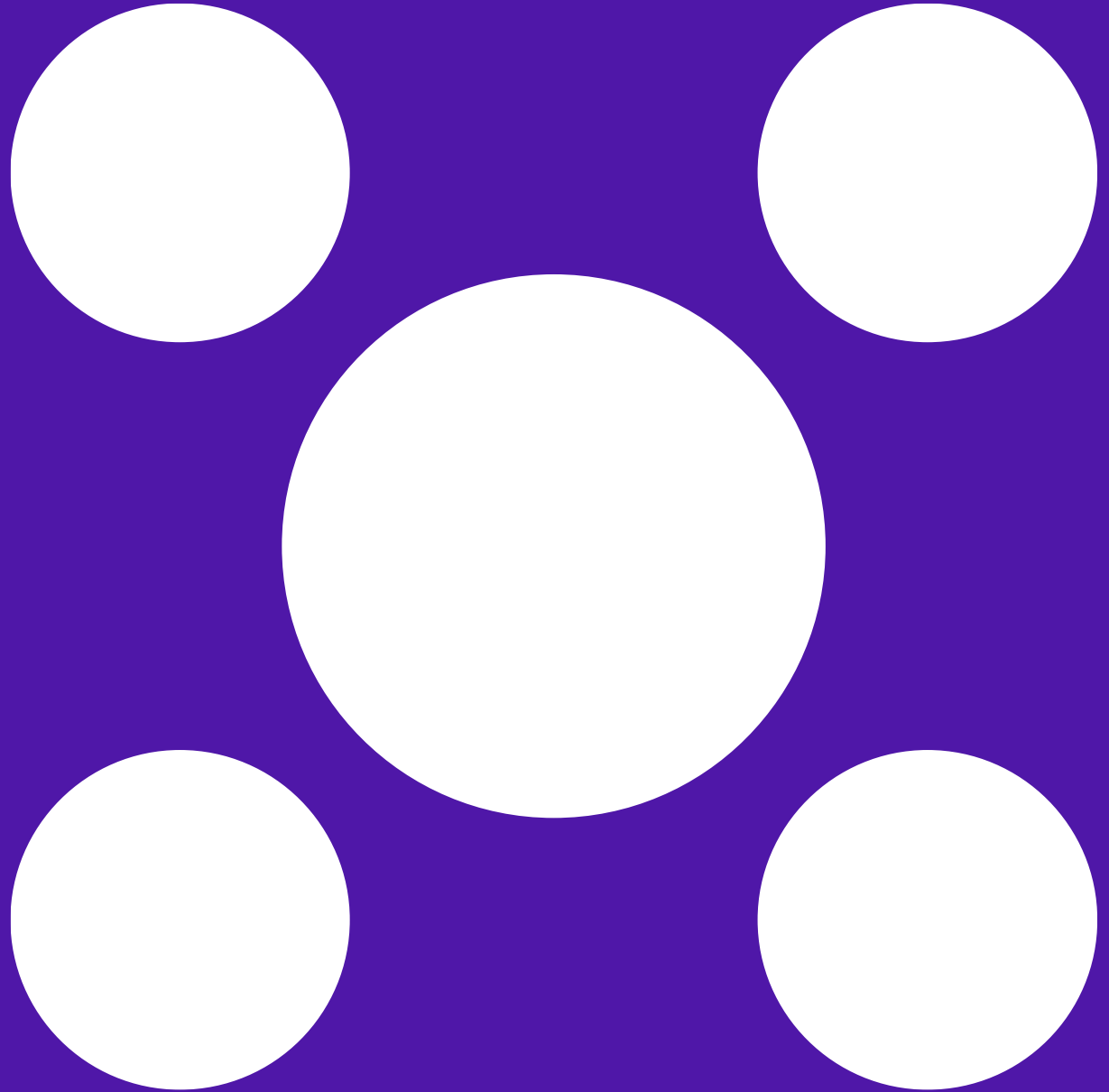
12. Communication and Transparency:

- a. Maintain open and transparent communication channels within the organization. Keep members informed about leadership opportunities and the progress of the succession planning initiative.
- By implementing these strategies and recommendations, PMI-LA can create a structured and sustainable Leadership Succession Planning program that addresses the identified challenges and ensures a continuous pipeline of future leaders ready to serve as board members.

Key Strategies to Building a Strong Nonprofit Board of Directors

1. [Understanding the Role of a Nonprofit Board: Breaking Down the Responsibilities and Expectations](#)
2. [How to Recruit and Select the Right Board Members for Your Nonprofit](#)
3. [The Importance of Diversity and Inclusion on Nonprofit Boards: Strategies for Achieving Greater Representation](#)
4. [Building a Culture of Trust and Transparency within Your Nonprofit Board](#)
5. [Developing a Strategic Plan for Your Nonprofit Board: Identifying Goals, Priorities, and Metrics for Success](#)
6. [Effective Board Meetings: Tips for Productive and Engaging Sessions](#)
7. [Financial Stewardship: How to Ensure Your Nonprofit Board is Meeting its Fiduciary Responsibilities](#)
8. [Board Development: Strategies for Training and Developing Your Board Members](#)
9. [Building Strong Relationships with Key Stakeholders: Engaging Donors, Volunteers, and Community Partners](#)
10. [Evaluating Board Performance: Metrics and Tools for Assessing the Success of Your Nonprofit Board](#)
11. [Conflict Resolution: Strategies for Managing Disagreements and Challenges within Your Nonprofit Board](#)
12. [Board Succession Planning: Preparing for the Future of Your Nonprofit Leadership](#)
13. [The Role of Board Members in Fundraising: Strategies for Engaging Your Board in Development Efforts](#)
14. [Celebrating Board Achievements: Recognizing and Rewarding Your Nonprofit Board for their Dedication and Hard Work](#)

LEADERSHIP DEVELOPMENT SUCCESSION PLANNING READINESS



Leadership Development Succession Program Readiness (1 of 2)

An organization is ready to engage in succession planning when it recognizes the need for continuity and stability in leadership and has several indicators that signal preparedness. Here are some key signs:

- 1. Leadership Awareness and Support:** The leadership team acknowledges the importance of succession planning and is committed to the process. This includes understanding the risks of not having a plan in place.
- 2. Strategic Alignment:** The organization has a clear strategic vision and understands how succession planning fits into its long-term goals. Succession planning should support the overall strategic direction of the company.
- 3. Talent Identification and Development:** There is a systematic approach to identifying and developing internal talent. The organization has established programs for employee development, mentoring, and training.
- 4. Organizational Stability:** The company is relatively stable in terms of its financial health, culture, and operations. While succession planning can be initiated at any time, a stable environment facilitates a smoother process.
- 5. Defined Key Positions:** Critical roles within the organization are clearly identified. These are positions that, if left vacant, would significantly impact the organization's performance.
- 6. Data and Metrics:** The organization has access to relevant data and metrics to evaluate potential successors. This includes performance reviews, career aspirations, and readiness assessments.

Leadership Development Succession Program Readiness (2 of 2)

7. **Risk Management Focus:** There is a recognition of the risks associated with leadership vacancies and a desire to mitigate these risks proactively. This often aligns with broader risk management strategies.
8. **Cultural Readiness:** The organization's culture supports growth, development, and change. Employees feel encouraged to develop their careers within the company, and there is an open dialogue about career progression.
9. **Leadership Transition History:** Previous leadership transitions have highlighted the need for better planning. Lessons learned from past experiences can be a catalyst for implementing a more structured succession plan.
10. **Resources and Tools:** The organization has the necessary resources, tools, and processes in place to support succession planning. This might include HR software, assessment tools, and external consultants if needed.

If these indicators are present, the organization is likely ready to embark on a succession planning process to ensure a smooth transition of leadership and maintain organizational continuity.

Is your Board engaging in succession planning?

- Are you truly engaging in strategic and sustainable long-term planning, or just pursuing a quick fix?
- While approaches to succession planning vary, they tend to take a longer-term perspective than replacement hiring, which focuses on filling vacancies as they arise.
- Find out if your succession plan has matured beyond replacement hiring with SIGMA's "Are you engaging in succession planning?" template – a quick and simple checklist.

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Are you engaging in succession planning?



Are you truly engaging in strategic and sustainable long-term planning, or just pursuing a quick fix? While approaches to succession planning vary, they tend to take a longer-term perspective than replacement hiring, which focuses on filling vacancies as they arise. Find out if your succession plan has matured beyond replacement hiring with our quick and simple checklist.

Planning

- Do you know who will replace each position on your senior management team?
- Do you know who will fill the vacancies left by those who move into leadership roles?
- Do you prepare candidates for their new position with job shadowing or in-role training before they are promoted?
- Do you have options of candidates to choose from when a role becomes available?
- Are your candidates aware of their status as high-potentials?

Integration

- Do you hire with leadership or promotion potential in mind?
- Is in-house training available for your employees to ensure candidates are developed over time?
- Does your organization offer a budget for external training opportunities?
- Are leaders encouraged to initiate conversations with staff about their career aspirations?
- Do you provide high-potentials and succession candidates with regular opportunities for growth, such as stretch assignments, added responsibilities, or promotions, to retain their interest and engagement?

Decision Making

- Are succession candidates evaluated for readiness based on the role requirements of the focal position?
- Were these role requirements determined with objective assessments?
- Are candidates chosen on factors outside of their similarity to the current role incumbent?
- Do you involve multiple stakeholders in the candidate selection process?
- Do you use validated assessment tools to ensure the right candidates are considered for the right role?

Success

- Is your company able to retain top talent?
- Do your employees show growth and skill development during their tenure with your organization?
- Are you able to find suitable candidates from within the organization?
- Does the person chosen for the role reflect the long-term goals and planning for the organization?
- When a role becomes available, is a candidate ready to take it on immediately?

Your Score **0** Reset

- 0–6 Heavy reliance on replacement hiring**
Implement succession planning to adopt a long-term focus
- 7–13 Demonstrates need for improvement**
Consider how your company can be more strategic in its succession planning
- 14–20 Mature plan with few adjustments required**
Focus on further developing plan for long-term success

Regardless of your score, SIGMA can help. Our *Succession Planning Launch Series* takes only two half-days of your time, and delivers a comprehensive full-year implementation plan for each member of your executive team. Find out more [here](#).

Assessing the risk if your leader leaves

If you answered **“No” to four or more** of the questions, your organization may be at risk for damage in the wake of a departing leader.

#	Question	Yes	No
1	Our organization has a strategic plan.	<input type="checkbox"/>	<input type="checkbox"/>
2	Our strategic plan includes sections on leadership and/or human capital development.	<input type="checkbox"/>	<input type="checkbox"/>
3	Our organization has a written emergency succession plan.	<input type="checkbox"/>	<input type="checkbox"/>
4	Our budget designates more than one percent of revenues for board or staff development.	<input type="checkbox"/>	<input type="checkbox"/>
5	Our executive has been in his or her position fewer than seven years.	<input type="checkbox"/>	<input type="checkbox"/>
6	Our executive director has said either formally or informally that he/she plans to stay with the organization for four or more years.	<input type="checkbox"/>	<input type="checkbox"/>
7	Our executive shares responsibility for fundraising or the relationships we need for fundraising with other staff and board members.	<input type="checkbox"/>	<input type="checkbox"/>
8	Our board chair has served less than five consecutive years.	<input type="checkbox"/>	<input type="checkbox"/>
9	Our board has well-defined term limits.	<input type="checkbox"/>	<input type="checkbox"/>
10	Most of our board members have served fewer than six years.	<input type="checkbox"/>	<input type="checkbox"/>
11	Our board represents a level of economic, cultural, and/or racial diversity appropriate to our mission and/or found in our community.	<input type="checkbox"/>	<input type="checkbox"/>
12	Our board has a committee or designated group responsible for identifying, recruiting, and supporting new board members.	<input type="checkbox"/>	<input type="checkbox"/>

A Succession Planning Checklist (1 of 2)

When the following conditions are in place, an organization can expect a relatively smooth transition to new leadership whenever it might occur. An organization might determine which elements below are lacking in its current operations and then create a “succession plan” or “capacity building plan” that prescribes activities and timelines for filling the gaps. The organization is then ready for leadership transitions, foreseen or unforeseen.

- A strategic plan is in place with goals and objectives for the near term (up to three years), including objectives for leadership talent development.
- The board evaluates the executive director annually on general performance and achievement of strategic goals.
- The board, based on its annual self-evaluation, is satisfactorily performing its major governance jobs—financial oversight, executive support and oversight, policy development, and strategic planning.
- The executive’s direct reports, based on annual evaluations, are judged as solidly skilled for their positions.

A Succession Planning Checklist (2 of 2)

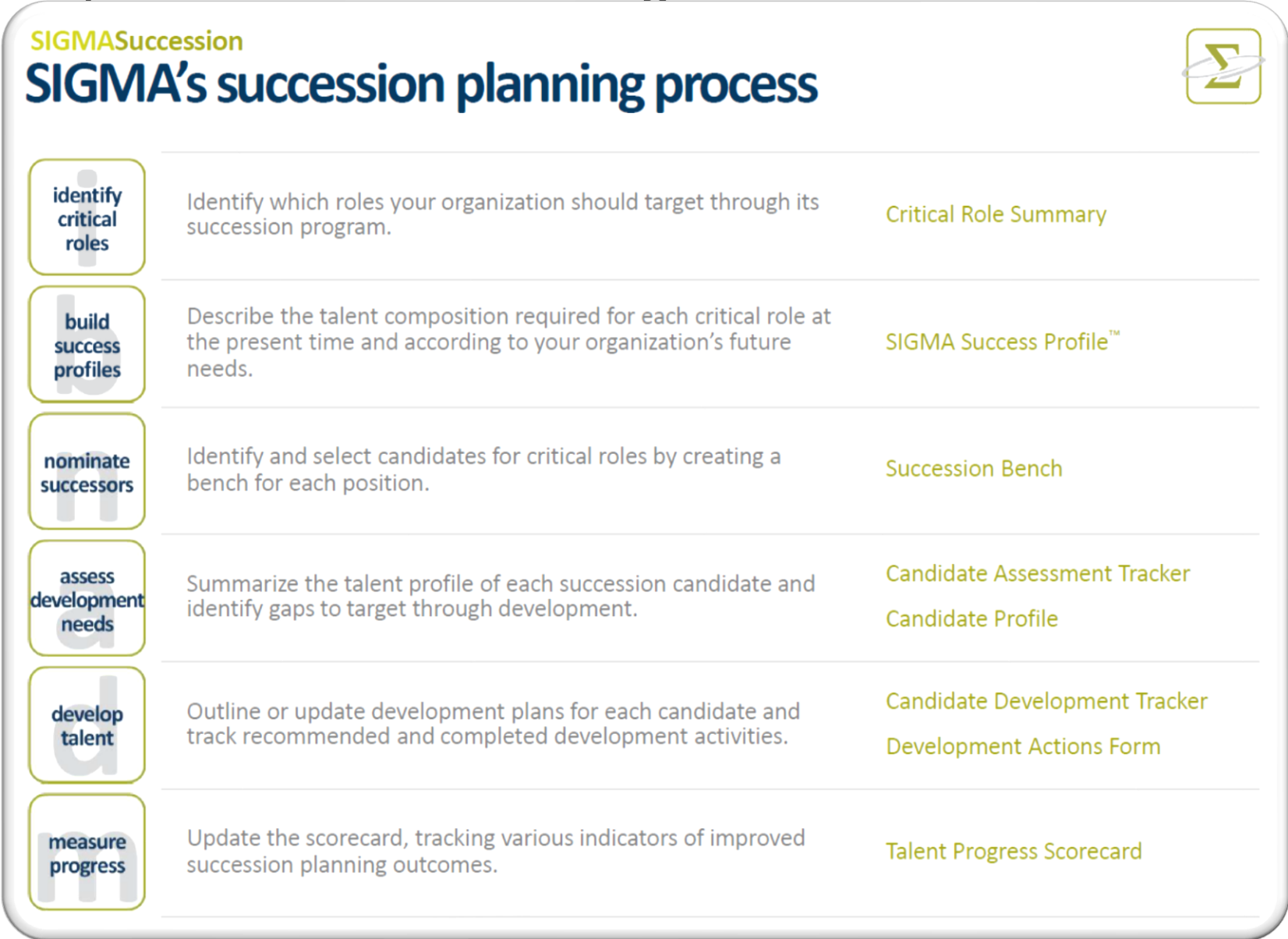
- ❑ The top management cohort, as a high performing team:
 - ❑ Has a solid team culture in place in which members support one another and can reach decisions as a group efficiently and harmoniously;
 - ❑ Shares leadership of the organization with the executive in having significant
 - ❑ input to all major agency decisions;
 - ❑ Can lead the organization in the absence of the executive; and
 - ❑ Has authority to make and carry out decisions within their respective areas of
 - ❑ responsibility.
- ❑ Another staff person or board member shares important external relationships (major donors, funders, community leaders) maintained by the executive.
- ❑ A financial reserve is in place with a minimum of three months' operating capital.
- ❑ Financial systems meet industry standards. Financial reports are up to date and provide the data needed by the board and senior managers responsible for the agency's financial strength and viability.
- ❑ Operational manuals exist for key administrative systems and are easily accessible and up to date.
- ❑ Top program staff have documented their key activities in writing and have identified another staff person who can carry their duties in an emergency.

SIGMA SIX-STEP SUCCESSION PLANNING PROCESS

SIGMA's 6-Step Succession Planning Process

- Succession planning is one of the most important strategic processes your organization will undertake. However, proper succession planning can be incredibly time consuming.
- The succession planning process is dynamic – as organizational needs change, the succession plan must evolve as well.
- It is important to consider how volunteer aspirations and talents can be aligned with the internal and external environment of the organization.
- Robust succession management provides a roadmap for success, ensuring the necessary structure to support effective, efficient, and consistent communication and implementation throughout all levels of the organization.


SIGMA's 6-Step Succession Planning Process



Step 1: Identify critical roles

- **Step 1:** Identify critical roles
 - Identify which roles your organization should target through its succession program
 - **Template:** Critical Role Identification Questionnaire

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Critical Role Identification Questionnaire

Reset Form Save Form 

1 Not true of this role 2 Slightly true of this role 3 Somewhat true of this role 4 Moderately true of this role 5 Extremely true of this role

Role	Urgency This role is likely to be vacant soon (i.e., retirement)	Impact A vacancy would immediately impact business	Skills Role requires specialized skills or knowledge	Internal Talent No internal candidates are ready for this role	External Talent Hiring externally for this role would be difficult	TOTAL	★
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	0	


Step 2: Build success profiles

- **Step 2:** Build success profiles
 - Describe the talent composition required for each critical role at the present time and according to your organization's future needs
 - **Template:** Success Profile

The screenshot shows the 'SIGMA Succession success profile' interface. At the top right, there are 'Reset' and 'Save As' buttons and a logo. Below the title is a header table with columns: 'Succession Position', 'Current Incumbent', 'Eligibility Year', and 'Urgency'. The main content area is divided into two sections: 'Position Demographics' and 'Leadership Profile'. 'Position Demographics' includes fields for 'Location', 'Level', and 'Area'. 'Position Criteria' includes a list of criteria: 'Edu', 'Exp', 'Exp', 'Exp', 'Know', 'Skill', 'Skill', 'Skill', 'Skill', 'Duty', 'Duty', 'Duty', 'Duty', 'Duty'. The 'Leadership Profile' section is a large table with three vertical columns: 'Leadership: Current Competencies', 'Core Role: Current Competencies', and 'Emotional Intelligence'. Below these are three more vertical columns: 'Leadership: Future', 'Core: Future', and 'Other: Future'. The table is currently empty.

Step 3: Nominate successors (1)

- **Step 3:** Nominate successors
 - Identify and select candidates for critical roles by creating a bench for each position
 - **Template:** Nomination Survey

SIGMASuccession nomination survey Reset Save As 

Succession Position		Nominations Completed By			Date
Candidate Name	Candidate Position	Readiness			Comments
		<input type="checkbox"/> 1-3 yrs.	<input type="checkbox"/> 3-5 yrs.	<input type="checkbox"/> 5+ yrs.	
		<input type="checkbox"/> 1-3 yrs.	<input type="checkbox"/> 3-5 yrs.	<input type="checkbox"/> 5+ yrs.	
		<input type="checkbox"/> 1-3 yrs.	<input type="checkbox"/> 3-5 yrs.	<input type="checkbox"/> 5+ yrs.	
		<input type="checkbox"/> 1-3 yrs.	<input type="checkbox"/> 3-5 yrs.	<input type="checkbox"/> 5+ yrs.	
		<input type="checkbox"/> 1-3 yrs.	<input type="checkbox"/> 3-5 yrs.	<input type="checkbox"/> 5+ yrs.	
		<input type="checkbox"/> 1-3 yrs.	<input type="checkbox"/> 3-5 yrs.	<input type="checkbox"/> 5+ yrs.	
		<input type="checkbox"/> 1-3 yrs.	<input type="checkbox"/> 3-5 yrs.	<input type="checkbox"/> 5+ yrs.	
		<input type="checkbox"/> 1-3 yrs.	<input type="checkbox"/> 3-5 yrs.	<input type="checkbox"/> 5+ yrs.	
		<input type="checkbox"/> 1-3 yrs.	<input type="checkbox"/> 3-5 yrs.	<input type="checkbox"/> 5+ yrs.	
		<input type="checkbox"/> 1-3 yrs.	<input type="checkbox"/> 3-5 yrs.	<input type="checkbox"/> 5+ yrs.	

Step 3: Nominate successors (2)

- **Step 3:** Nominate successors
 - Identify and select candidates for critical roles by creating a bench for each position
 - **Template:** Succession Bench

SIGMASuccession Reset Save As 

succession bench

Succession Position	Current Incumbent	Eligibility Year	Priority	Bench Strength
				A: B: C:

Candidate List								
	Candidate Name		Progression to Succession Position			Succession Path		
	First	Last	Level C	Level B	Level A	Current Position	Next Position	Readiness for Next
Level A Ready in 1-3 years								
Level B Ready in 3-5 years								
Level C Ready in 5+ years								

Step 4: Assess development needs (1)


- **Step 4:** Assess development needs
 - Summarize the talent profile of each succession candidate and identify gaps to target through development
 - **Template:** [Leadership Skills Profile – Revised \(LSP-R\)](#)
 - What is the LSP-R™ Focus?
 - The Leadership Skills Profile-Revised (LSP-R) Focus is a personality-based leadership skills assessment that is useful for guiding employee and leader development efforts. The LSP-R Focus is built on years of rigorous development efforts and validation research. When paired with the benchmarking option, it provides a flexible experience, allowing you to choose which leadership traits to include in your report. As a result, you get a customizable test that provides personalized advice for test-takers. Our user-friendly report will guide leaders to focus development efforts on those competencies that have the greatest potential to become strengths.



Step 4: Assess development needs (2)

- **Step 4:** Assess development needs
 - Summarize the talent profile of each succession candidate and identify gaps to target through development
 - **Template:** Candidate Profile

SIGMASuccession
candidate profile

Reset Save As 

Succession Position	Candidate Name	Current Position

Candidate Demographics

Location	
Level	
Area	

Candidate Training

Education	Experience

Focal Role Criteria

<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Leadership Profile Assessment Results

Strengths	Leadership Competency Gaps	Role Competency Gaps

Step 5: Develop talent

- **Step 5:** Develop talent
 - Outline or update development plans for each candidate and track recommended and completed development activities
 - **Template:** Development Actions Form

SIGMASuccession Reset Save As 

development actions form

Succession Position	Candidate Name	Current Position

Top Development Areas	
1.	4.
2.	5.
3.	6.


Development Actions				
	Development Area	Action	Timeline	Progress / Comments
3-6 Months				
6-12 Months				
12+ Months				

Notes

Step 6: Measure progress

- **Step 6: Measure progress**
 - Update the scorecard, tracking various indicators of improved succession
 - **Template:** Talent Progress Scorecard

SIGMASuccession
Talent Progress Scorecard

[Reset Form](#) 

List any additional indicators below. Enter the date and data when each measurement period comes around. Begin with the data pre-succession process.

Indicator	Date				
Critical Positions Filled Internally (%)					
Management Positions Filled Internally (%)					
Average Time Hi-Potentials in Same Role (Yrs.)					
Hi-Potential Turnover (%)					
Critical Positions with 3+ Successors (%)					
Average Years Until Ready					
Hi-Potential Engagement					
Individual Improvement					

SIGMA Succession Planning Guide and Templates

- For a complete printable version of all of SIGMA’s succession planning templates and to learn more about their [succession planning process](https://www.sigmaassessmentsystems.com/succession/succession-planning-template-library/), launch this website: <https://www.sigmaassessmentsystems.com/succession/succession-planning-template-library/>



Succession Planning Guide

SIGMA's Succession Planning Guide includes our most important templates in chronological order, as well as instructions and examples to guide you through SIGMA's six-step succession planning process.

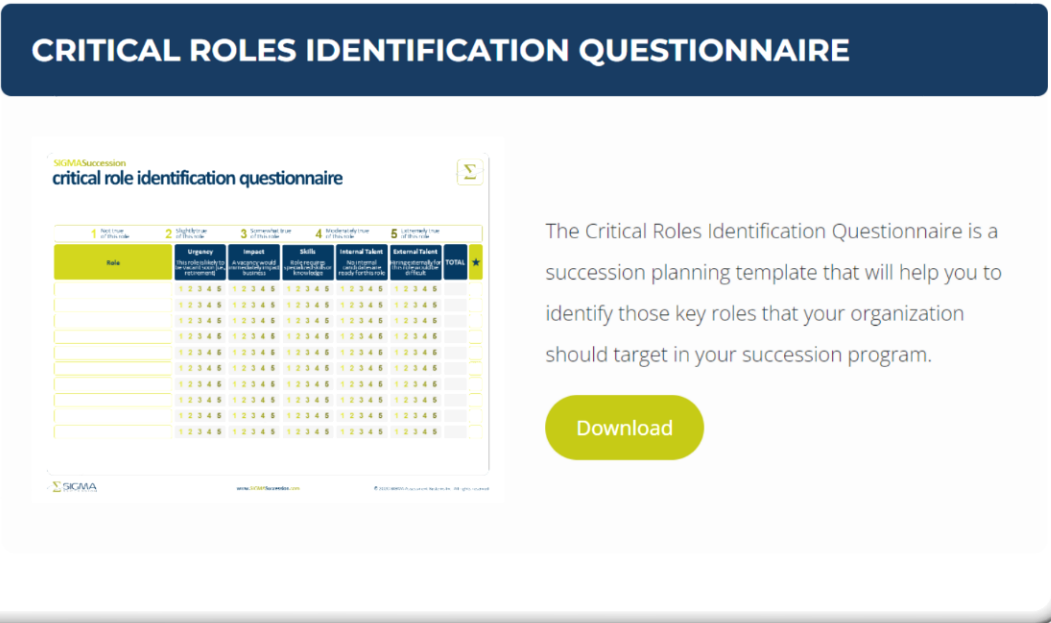
[Download the Succession Planning Guide](#)

SIGMA's Succession Planning Guide outlines a straightforward process for identifying and developing individuals within the organization to replenish existing talent when roles become vacant. This planning guide takes users through SIGMA's 6-stage succession cycle to identify critical leadership roles, build leader success profiles, nominate high potential talent, assess development needs, develop talent, and measure your organization's progress. The guide provides templates for each stage.

SUCCESSION PLANNING TEMPLATES

- Critical Roles Identification Questionnaire
- Success Profile Template
- Succession Nomination Survey Template
- Succession Bench Template
- Candidate Succession Profile Template
- Development Actions Form
- Talent Progress Scorecard Template
- Succession Planning Guide
- Succession Planning Checklist

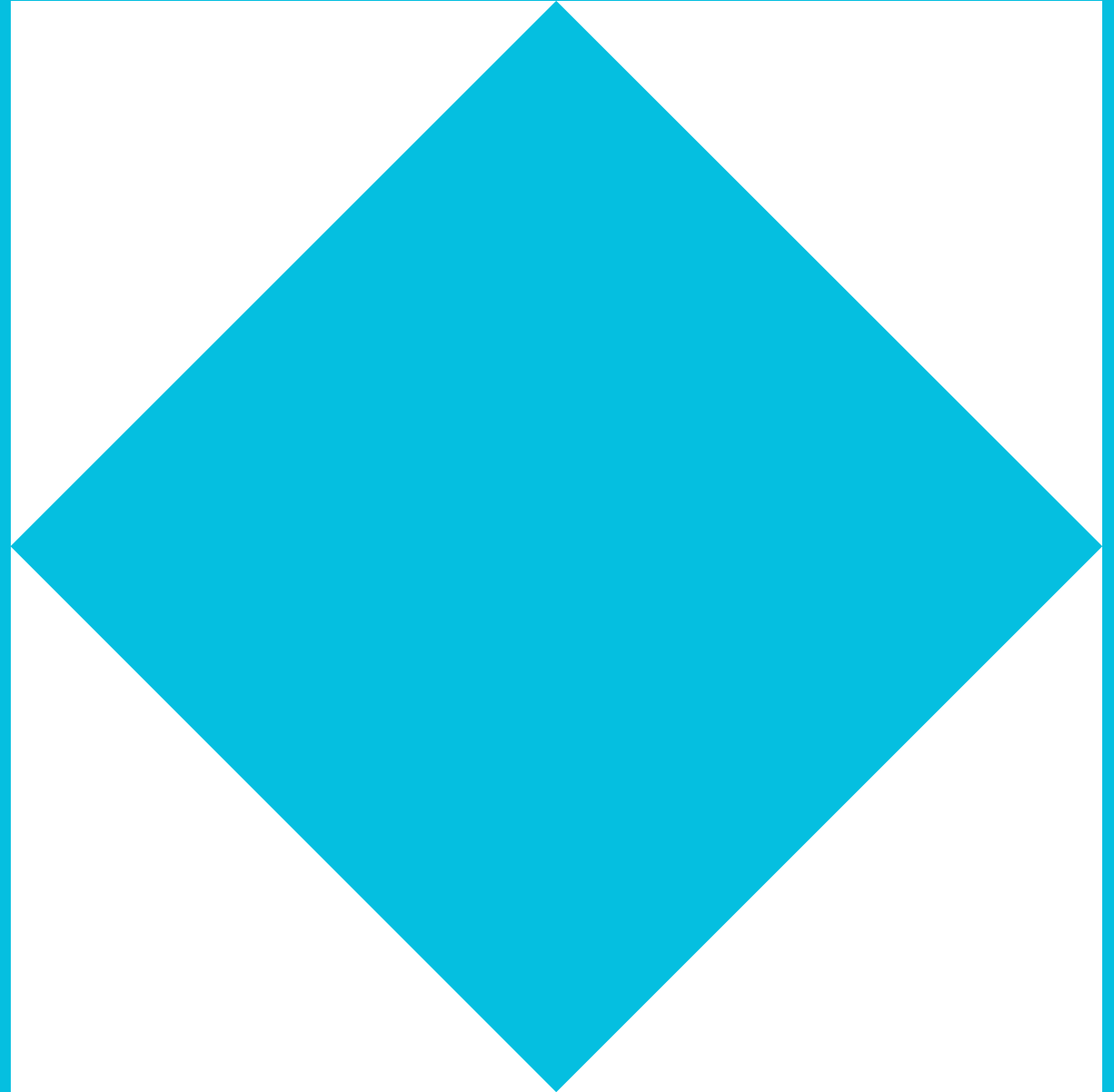
CRITICAL ROLES IDENTIFICATION QUESTIONNAIRE



The Critical Roles Identification Questionnaire is a succession planning template that will help you to identify those key roles that your organization should target in your succession program.

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PMI-LA LEADERSHIP DEVELOPMENT PROGRAM



PMI-LA Leadership Development Program (LDP)

- A Leadership Development Program (LDP) designed to support succession planning is a strategic initiative aimed at identifying, developing, and preparing high-potential volunteers to fill key leadership roles (aka Board) within PMI-LA.
- This program ensures that PMI-LA has a pipeline of skilled and capable leaders ready to step into critical positions as they become available.
- **Objectives:**
 - **Identify Potential Leaders:** Recognize volunteers with the potential to take on leadership roles.
 - **Develop Leadership Skills:** Equip volunteers with the necessary skills, knowledge, and experience to succeed in leadership positions.
 - **Support Succession Planning:** Create a robust succession pipeline to ensure organizational continuity and stability.
 - **Enhance Volunteer Engagement:** Increase motivation and retention by providing leadership growth opportunities.
- **Qualifications:**
 - Has been an active PMI-LA volunteer for a minimum of 6 months
 - Recommendation from at least one current Board member

PMI-LA Leadership Development Program (LDP)

- **Key Components of the LDP:**

- PMI-LA volunteers complete an application to document why they are interested in the program, supporting evidence of their leadership skills, why they would be an ideal candidate for the program, and the functional area (e.g., membership, program, finance, marketing, etc.) that they're interested in. Application will be released in March.
- Selection of 4-6 leader candidates will occur in April
- Each leader candidate will be matched with a current VP, Immediate Past President, or Trustee
- 3-month program from May, June, July; these months were selected because it allows the VP to get organized in the first 3 months of their role and that leader candidates will also be able to experience the Mid-Year Strategy Meeting
- Leader candidates will need to sign acknowledgement of the confidentiality, conflict of interest, and code of ethics forms
- Leader candidates will shadow the VP, Immediate Past President, or Trustee
- Leader candidates will be provided with an opportunity to learn about the role of a nonprofit board member
- Leader candidates will receive feedback and progress will be tracked
- At the end of the 3 months, leader candidates will complete a self-evaluation of what they have learned and provide their comments and feedback of their experience
- VP, Immediate Past President, or Trustee will complete an evaluation of the leader candidate

PMI-LA Leadership Development Program (LDP)

- **Key Areas of Training for the Leader Candidates:**

1. **Governance and Fiduciary Responsibilities**

- a. Understanding Governance: Training on the principles of nonprofit governance, including the role of the board, governance models, and best practices.
- b. Fiduciary Duties: Educating on the fiduciary responsibilities of board members, including the duty of care, loyalty, and obedience.
- c. Legal and Ethical Obligations: Understanding the legal and ethical obligations of board members, including compliance with nonprofit laws and regulations.

2. **Strategic Planning and Oversight**

- a. Strategic Planning: Training on how to develop, implement, and monitor the organization's strategic plan.
- b. Oversight Functions: Understanding the board's role in overseeing the organization's activities, ensuring alignment with the mission, and achieving strategic goals.

3. **Financial Management and Fundraising**

- a. Financial Literacy: Basics of nonprofit financial management, including reading financial statements, budgeting, and financial reporting.
- b. Fundraising and Development: Training on fundraising strategies, donor relations, and the board's role in fundraising efforts.

4. **Board Roles and Responsibilities**

- a. Roles and Responsibilities: Clear definition of the roles and responsibilities of board members, including specific roles such as the chair, treasurer, and secretary.
- b. Effective Meetings: Conducting effective board meetings, including agenda setting, facilitation skills, and decision-making processes.

5. **Nonprofit Sector Knowledge**

- a. Nonprofit Landscape: Understanding the unique aspects of the nonprofit sector, including its challenges, opportunities, and regulatory environment.
- b. Mission and Programs: Deep knowledge of the organization's mission, programs, services, and impact.

6. **Leadership and Teamwork**

- a. Leadership Skills: Developing leadership skills, including visioning, strategic thinking, and influencing.
- b. Team Dynamics: Training on working effectively as a team, managing conflicts, and building consensus.

7. **Risk Management and Compliance**

- a. Risk Management: Identifying and managing risks, including financial, operational, reputational, and strategic risks.
- b. Compliance: Ensuring compliance with laws, regulations, and organizational policies.

8. **Stakeholder Engagement**

- a. Stakeholder Relations: Engaging with key stakeholders, including donors, beneficiaries, staff, volunteers, and the community.
- b. Advocacy: Training on advocacy skills and the board's role in advocating for the organization's mission and cause.

9. **Diversity, Equity, and Inclusion (DEI)**

- a. DEI Training: Understanding the importance of diversity, equity, and inclusion within the board and the organization.
- b. Cultural Competence: Developing cultural competence and the ability to work effectively with diverse communities.

10. **Evaluation and Continuous Improvement**

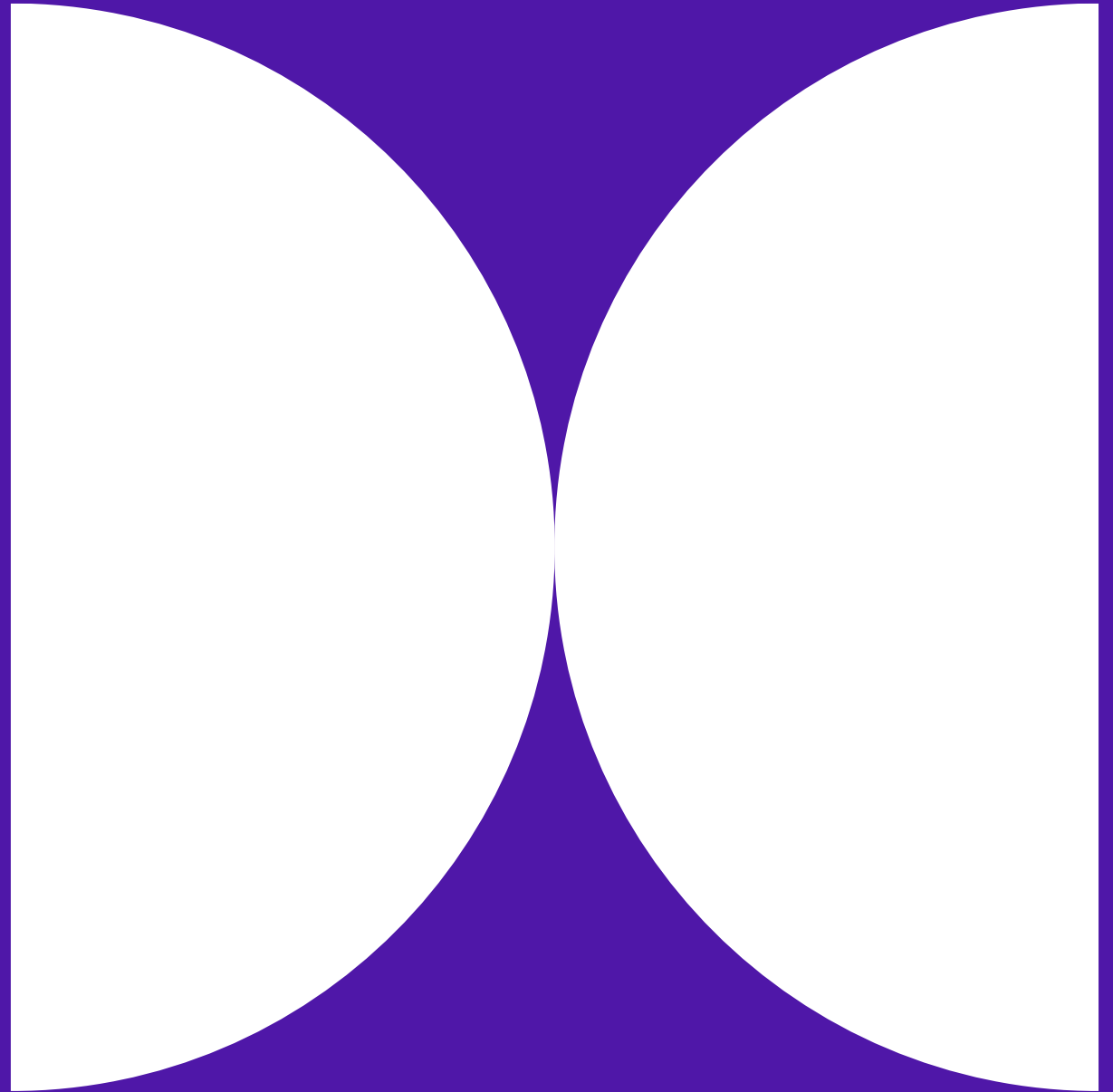
- a. Board Evaluation: Methods for evaluating board performance and individual member contributions.
- b. Continuous Improvement: Strategies for ongoing learning and development to enhance board effectiveness.

PMI-LA Leadership Development Program (LDP)

- **LDP Pilot Program:**
 - PMI-LA will implement this program in 2025
 - The first cohort of leader candidates will be the current AVPs
 - Having a pilot program will provide an opportunity to work through the kinks with an opportunity to make some adjustments so that future LDP cohorts will have a better experience
- A well-structured Leadership Development Program not only prepares future leaders but also fosters a culture of continuous learning and development within the organization, ensuring long-term success and sustainability.



Q&A | DISCUSSION



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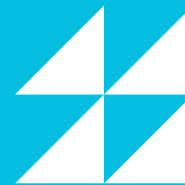
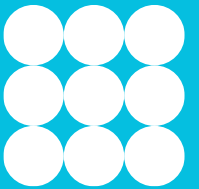
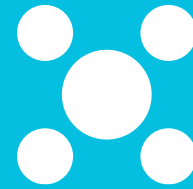
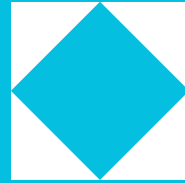
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THANK YOU



DAVID C. DOAN

LinkedIn: <https://www.linkedin.com/in/david-c-doan/>

