



FRIDMAN
STRATEGIES

LEADERSHIP SUCCESSION: Planning with Intentionality

**NANETTE R. FRIDMAN
FRIDMAN STRATEGIES**

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A photograph of a concrete path leading through a green lawn. The path is made of several rectangular slabs of light-colored concrete, separated by narrow strips of grass. The path starts from the bottom left and goes towards the top left, then turns and goes towards the top right. The lawn is a vibrant green color. The text is overlaid on the right side of the image.

“The single biggest way to impact an organization is to focus on leadership development. There is almost no limit to the potential of an organization that recruits good people, raises them up as leaders and continually develops them.”

-John Maxwell

Goals

- ▶ Discuss ownership of succession
- ▶ Understand the ideal succession process
- ▶ Discuss ways to retain and motivate current volunteers
- ▶ Share best practices in approaching prospective leaders
- ▶ Brainstorm together to solve succession challenges
- ▶ Begin to formulate your succession plans

Warm Up

- ▶ Does this look familiar?
- ▶ Do you know who will succeed your current legacy team members?



"Hello, J.G.? I've found a volunteer who's willing to head up the fund drive!"

Ownership for Succession Planning

- ▶ When does your current legacy team leader's term end?
- ▶ Who is accountable for succession planning?
- ▶ Who is responsible for succession planning?
- ▶ Who is involved with succession planning?
- ▶ What is the timing for the process?

Ideal Succession Planning

- ▶ 1-2 years *in residency*
- ▶ Designee in the loop
- ▶ Coaching by the legacy coordinator at the Federation/Jewish Community Foundation who is administering the program in the community, conferences etc.
- ▶ Mentoring by outgoing chair or past leaders
- ▶ Boot camp hand-off only if necessary

During Residency

- ▶ Shadowing
- ▶ In the know
- ▶ Participating in meetings
- ▶ Playing visible role
- ▶ Getting training and coaching
- ▶ Going to conferences
- ▶ Goal setting
- ▶ Getting excited!

Ideal Legacy Committee Members

- ▶ Past Presidents - Make automatic
- ▶ Past Development Committee Chairs
- ▶ Active Grandparents
- ▶ Active Board members who are rolling off the board
- ▶ Alumni or Alumni Parents
- ▶ Parents
- ▶ Community Members
- ▶ Estate planning lawyers or financial advisors
- ▶ Legacy Donors
- ▶ Others?

Start Early

- ▶ Succession planning starts early
- ▶ Lay leader and professional should discuss and put on agenda for every quarter
- ▶ Maintain a database of prospects
- ▶ Evaluations should be used to surface potential leaders
- ▶ Informal conversations are encouraged
 - ▶ Could you see yourself as Chair?
 - ▶ Are you interested in serving on the Legacy Committee?
- ▶ Ask for recommendations from current and past Board and committee members
- ▶ Look broadly, ask committees, donors, staff, & community partners for recommendations

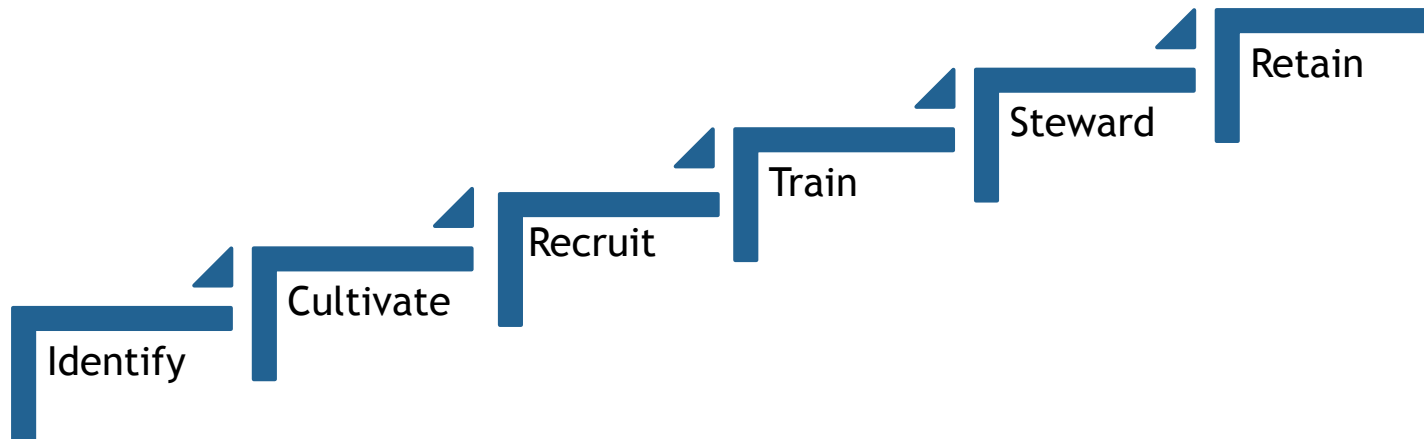
Job Description

- ▶ What are the current position's responsibilities?
- ▶ How is the job going to change, if at all?
- ▶ How long is the position?
- ▶ What is the expected weekly time commitment?
- ▶ What training is given?
- ▶ What support is provided?
- ▶ With whom would the person work with on the professional staff? Other lay leaders?
- ▶ What are the big issues the organization as a whole expects to be dealing with?

Prospecting for the Right Person

- ▶ Has already made or is willing to make a legacy commitment
- ▶ Connections/Circles
- ▶ Time to Give
- ▶ Skill/talents
- ▶ Personality
- ▶ Resources
- ▶ Relative to the campaign or future initiatives
- ▶ Relative to the others in leadership
- ▶ Good fit to work with the professionals
- ▶ Motivation
- ▶ Other?

Steps



Cultivation/Identification

- ▶ Who is the right person to be charged with cultivation?
- ▶ What is the prospect's current knowledge of your organization's legacy initiative?
What is their current involvement?
- ▶ What are the moves to further educate them?
- ▶ What are their motivations?

Cultivation

- ▶ How can we articulate the benefits of leadership?
 - ▶ Learning
 - ▶ Skill development
 - ▶ Engage deeply in community
 - ▶ Part of national network
 - ▶ Rewarding
 - ▶ Get to have a big impact
 - ▶ Securing the organization's future
 - ▶ Relationships
 - ▶ Modeling
 - ▶ Others?
- ▶ How can we showcase current leadership in a way that shows *kavod*?

Recruitment Information

- ▶ Legacy case statement
- ▶ Legacy plan
- ▶ Legacy team or committee structure
- ▶ Who is on the committee
- ▶ Committee charge
- ▶ Individual committee job descriptions
- ▶ Regular meeting schedule

The Ask

- ▶ The Right Person at the Right Time
- ▶ Why the Person You are Asking is *Uniquely Qualified* to Help and in What Way
- ▶ Present as an Honor, Show *Kavod*

Tools for Success

- ▶ Agreement
- ▶ Onboarding
- ▶ Training
- ▶ Coaching
- ▶ Mentoring



Expectations and Accountability

- ▶ Expectations/Brit
- ▶ Goal setting - short and long term
- ▶ Accountability

Stewardship of Leadership

- ▶ Meetings are well run and time is well used
- ▶ Roles are clear
- ▶ Communication is clear and regular
- ▶ Good partnership with the staff and board
- ▶ Staff support - tools, systems and organization
- ▶ Board and staff say “thank you”
- ▶ Progress is made and measured
- ▶ Sharing of positive stories and enthusiasm
- ▶ Celebration of success

Retaining and Growing Volunteers

- ▶ ***Positive attitude*** about legacy giving and the importance of building the organization's endowment
- ▶ ***Frequent conversations*** about how things are going, ask if volunteers feel that they are adequately supported & how they see their role now and in the future
- ▶ ***Appreciation and motivation*** from management team, development team, board chair, campaign chair etc. Spotlight!
- ▶ ***Professional development*** that supports their interests & how they want to grow
- ▶ ***Demonstrate benefits*** of leadership tailored to volunteer's motivations

Motivate with Progress

- ▶ Research performed by Harvard's Teresa Amabile concludes that there is nothing more motivating than progress.
- ▶ “This pattern is what we call the progress principle: of all the positive events that influence ‘inner work life’, the single most powerful is progress in meaningful work... facilitating progress is the most effective way to influence ‘inner work life’.”
- ▶ Working toward a shared vision and celebrating the power of small wins!

Once a Successor Takes Over

- ▶ Handing over the Reins
 - Celebration of past success
 - Look forward to future
- ▶ Former Chair
 - Lets go but remains engaged
 - Articulates desired future involvement
 - Finds future role
- ▶ Incoming Chair
 - Motivator in Chief
 - Makes contact with each Board/Committee member
 - Introduces him/herself to community and shares vision and goals

Having Trouble with Succession - Why?

- ▶ Are you prioritizing the position for leaders?
- ▶ Are you open to a different type of leader?
- ▶ Are you looking beyond the usual suspects?
 - ▶ Experienced “Outsider”
 - ▶ Inexperienced “Insider”
- ▶ Consider job descriptions and roles may have to be redefined or negotiated
- ▶ Are you selling the experience and the team?
- ▶ Have you considered co-chairs?
- ▶ Who is asking?
- ▶ Why are people saying no?
- ▶ How can we find the right leaders to keep others motivated and to keep legacy giving a priority for the organization in perpetuity?

Your Succession Planning Challenges

- ▶ What are some of the specific challenges that you encounter in succession planning?
- ▶ What are your next steps?

Questions and Answers





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Nanette Fridman

617-504-4234

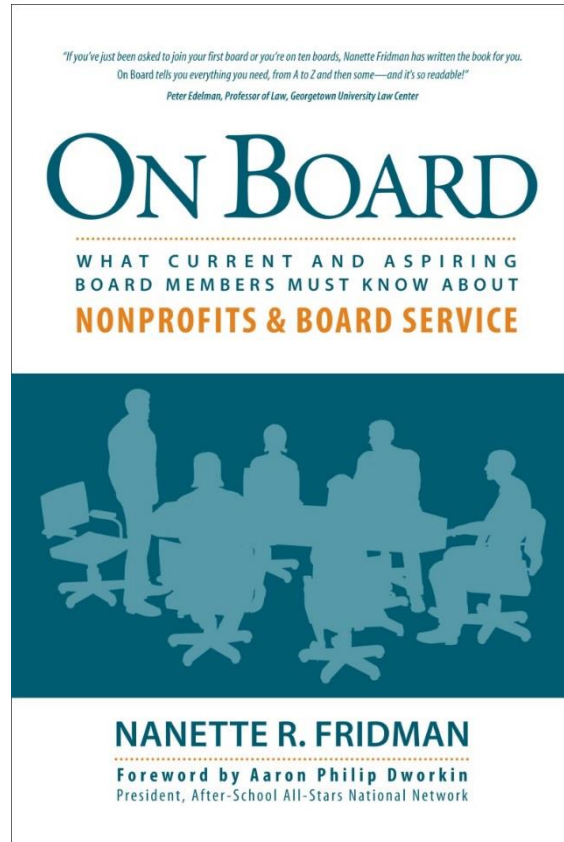
fridmanstrategies@gmail.com

www.fridmanstrategies.com

Get On Board!

“If you’ve been asked to join your first board or you’re on ten boards, Nanette Fridman has written the book for you. On Board tells you everything you need, from A to Z and then some – and it’s so readable!”

Peter Edelman
Professor of Law, Georgetown
University Law Center



“Even the best executive director can only do so much without a well-functioning board. This book is the perfect companion to any executive director who wants to build their board and drive more change into the communities they serve.”

Laura Gassner Otting,
Founder, Nonprofit
Professionals Advisory
Group