

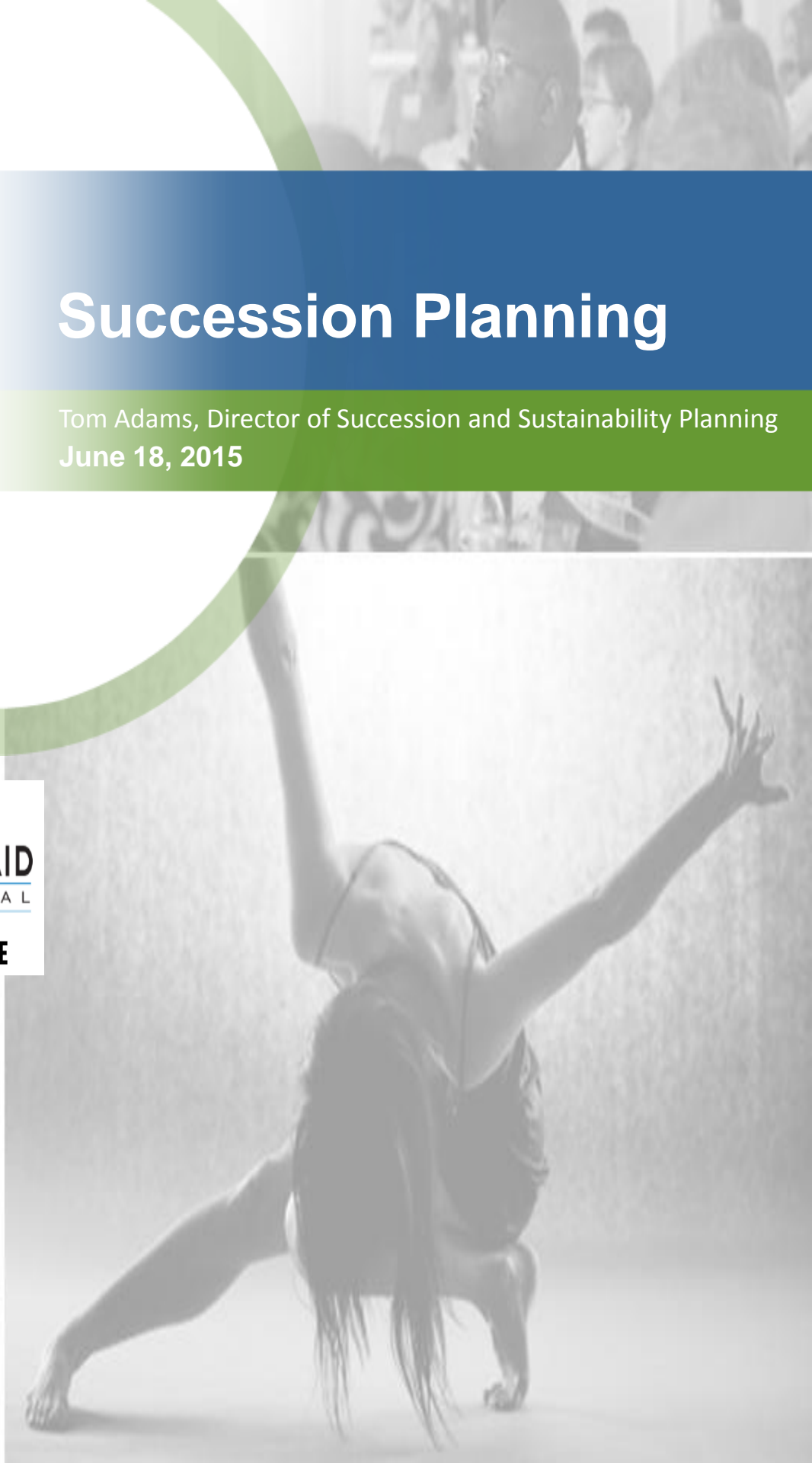


Succession Planning

Tom Adams, Director of Succession and Sustainability Planning
June 18, 2015



2015 ANNUAL CONFERENCE





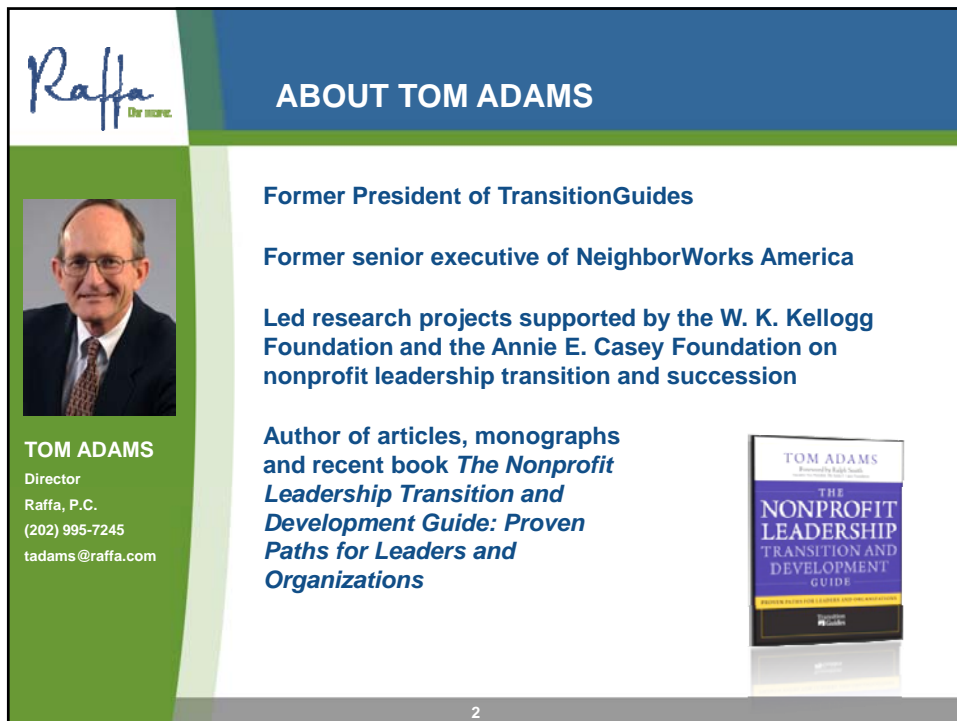
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Succession Planning

Tom Adams, Director of Succession and Sustainability Planning
June 18, 2015

TRAVELERS AID INTERNATIONAL
2015 ANNUAL CONFERENCE

The slide features a blue header with the Raffa logo and title. Below is a green bar with the speaker's name and date. The Travelers Aid International logo and conference name are in a white circle. The background shows a woman performing a handstand and a group of people in a meeting.



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ABOUT TOM ADAMS

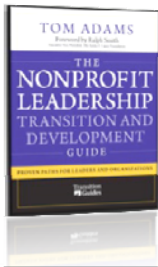
Former President of TransitionGuides

Former senior executive of NeighborWorks America

Led research projects supported by the W. K. Kellogg Foundation and the Annie E. Casey Foundation on nonprofit leadership transition and succession

Author of articles, monographs and recent book *The Nonprofit Leadership Transition and Development Guide: Proven Paths for Leaders and Organizations*

TOM ADAMS
Director
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The slide has a blue header with the Raffa logo and title. A green vertical bar on the left contains a portrait of Tom Adams and his contact information. The main content area is white with blue text. A book cover is shown on the right. A small number '2' is at the bottom center.



ABOUT RAFFA, P.C.



RAFFA, P.C.
1899 L Street, NW,
Suite 900
Washington, DC 20036
(202) 995-7245

Focuses on making the world a better place


Contributes to client's abilities to achieve their missions and deliver their promises to the world.

Keeps organizations compliant, effective, and efficient with practical back office support and deeper strategies that create sustainability

Provides expertise in consulting, accounting, nonprofit search, and technology services that help advance client's organizational missions.



3



LEARNING OBJECTIVES

1. Examine the succession planning process and the benefits of three succession planning approaches.
2. Discover how to introduce succession planning to your organization as a *risk management* and *leader development* practice.
3. Discuss the importance of combining sustainability planning with succession planning.
4. Explore a successful executive transition planning process.
5. Identify your *Next Steps* for a more prepared, leader-ready organization.

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WHY DO THIS WORK?




Page 5

This slide features a blue header with the Raffa logo and the text 'WHY DO THIS WORK?'. The main content area shows a close-up of a hand holding a white card with the word 'WHY' printed in large, bold, black letters. The background is a gradient from light to dark grey.

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WHAT IS SUCCESSION PLANNING?



Page 6

This slide features a blue header with the Raffa logo and the text 'WHAT IS SUCCESSION PLANNING?'. The main content area contains a graphic illustration with silhouettes of business professionals in a meeting, a lightbulb, and a question mark, symbolizing ideas and questions. The background is white with a green vertical bar on the left.

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WHY PLAN FOR SUCCESSION?

Gets us beyond the simple truth that we avoid:

- Ensures Organizational Sustainability
- Increases Transition Success
- Mitigates Risk



*All careers eventually lead to a transition...
It's just a matter of when and how well managed*

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SUCCESSION PLANNING – THREE APPROACHES



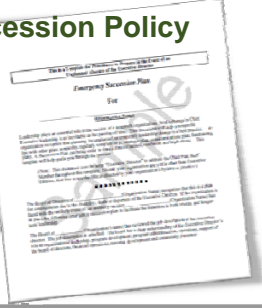
- 1. SUCCESSION ESSENTIALS**
 - Executive Backup Plan
 - Succession Policy
- 2. LEADER DEVELOPMENT**
 - Proactive Talent Management
- 3. DEPARTURE-DEFINED**
 - Succession Essentials
 - Sustainability Planning

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SUCCESSION PLANNING: ESSENTIALS

THE “ESSENTIALS”
Emergency Backup Plans
and
Board Adopted Succession Policy

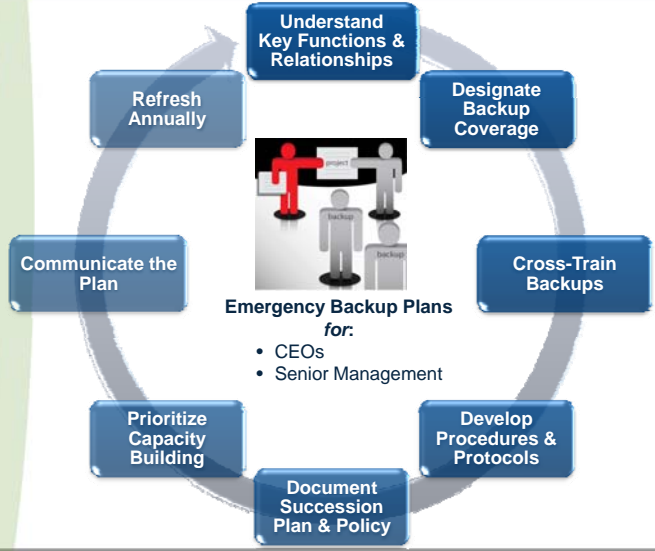


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SUCCESSION ESSENTIALS: EMERGENCY BACKUP PLANS


BENEFIT:
Ensures Continuity



Emergency Backup Plans
for:

- CEOs
- Senior Management

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SAMPLE: EMERGENCY BACKUP PLAN

[Executive Title]
EMERGENCY BACKUP SUCCESSION PLAN

Guideline for the Appointment of an Acting [Executive Title] in the Event of an Unplanned Absence of the Incumbent

1. Rationale

The [Executive Title] position in a nonprofit organization is a central element in the organization's success. Therefore, ensuring that the functions of the [Executive Title] are well-understood and shared among the [Senior Management Team] is important to ensure organizational stability and leadership continuity in the event of planned and unexpected change. This kind of risk management is equally helpful in facilitating a smooth leadership transition even when it is predictable and planned.

The purpose of this plan is to ensure the continuous coverage of duties critical to the ongoing successful operations of [Organization Name]. The Board of Directors is adopting policies and procedures for the temporary appointment of an Acting [Executive Title] in the event of an unplanned and extended absence of the [Executive Title]. The [Board President/Board Chair], or [Board Vice-President/Board Vice-Chair] in the absence of the [Board President/Board Chair], may determine the appropriate time to initiate the implementation of this plan.

While the Board of Directors acknowledges that such an absence is highly improbable and certainly undesirable, they believe that the diligence in exercising executive-level management functions requires that it have an Emergency Backup Succession Plan in place. The intent of this plan is to ensure continuity in the administration of the organization's day-to-day operations, programs, management of external relationships, and supervision of staff and finances.

4. Emergency Backup Succession Plan Implementation

The Board of Directors authorizes the [Board President/Board Chair] to implement the terms of this Emergency Backup Succession Plan in the event of a planned or unplanned temporary, short-term absence of the [Executive Title]. The [Board Vice-President/Board Vice-Chair] has authorization to implement this plan in the event that the [Board President/Board Chair] is unavailable or cannot be reached. Phone calls and conference calls are an acceptable substitute for any meetings designated in this plan.

As soon as feasible, following notification of an unplanned temporary or short-term absence, the [Board President/Board Chair] will convene an Executive Committee meeting to affirm the procedures prescribed in this plan, or modify them if needed. The Executive Committee may choose to amend and/or not to implement this plan.

While this timeline may vary based on circumstances, the suggested steps for implementation are:


- The [Board President/Board Chair] appoints an Acting [Executive Title].
- The [Board President/Board Chair] informs the Board of the Acting [Executive Title] appointment.
- The [Board President/Board Chair] (and potentially other officers) consults with the Acting [Executive Title] on the circumstances of the absence, organizational situation and related factors.
- After the [Board President/Board Chair] and Acting [Executive Title] consult, stakeholders will be notified following the defined Communications Plan.

2. Key Functions of the [Executive Title]

Of the duties listed in the job description (see Attachment 2), the key functions of the [Executive Title] have a corresponding temporary staffing strategy for an Acting [Executive Title] in the attached Emergency Backup Succession Plan Detail (see Attachment 3).

The [Senior Management Team] members assigned in the Short-Term Staffing of Key Functions are relevant based on the organizational structure in place at this time (see Attachment 2). In the event that those assigned are no longer available or positions are vacant, the [Board President/Board Chair] may select other staff to support each of the key [Executive Title] functions. It is the responsibility of

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SUCCESSION ESSENTIALS: SUCCESSION POLICY

BENEFIT:

Ensures Board Agreement

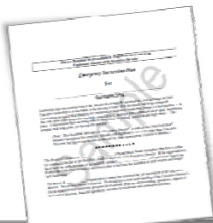
Board-adopted policy

Outlines how to handle a planned executive departure


Statement of commitment:

- Prepares for inevitable leadership change
- Assesses leadership needs before beginning a search

Plan to appoint interim leadership



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SAMPLE: SUCCESSION POLICY

[Organization Name]
[Executive Title]
Succession Policy

Introduction

A change in executive leadership is inevitable for all organizations. It is a time of both risk and opportunity. It is a period in an organization's history when the [Board President/Board Chair] must increase his/her level of engagement. It is also a time when some may seek assurance of the organization's viability and long-term sustainability.

A succession policy for the [Executive Title] position is a routine risk management and sustainability planning tool. The Succession Policy ensures organizational sustainability by providing a proactive, orderly plan for executive leadership transitions.

To that end, the Board of [Organization Name] is adopting this Succession Policy for purposes of:

1. Focusing Board attention on leadership development through annual communications between the [Executive Title] and Board about the depth of staffing and succession plans for [Senior Management Team] positions.
2. Establishing principles, role clarity and procedures to support positive leadership transitions that foster good endings and beginnings with departing and arriving leaders and build organizational capacity when a planned or unplanned executive leadership change occurs.

The [Board President/Board Chair] shall be responsible for implementing this policy and its related procedures, and for annually reviewing and updating the policy as needed.

Guiding Principles

[Organization Name] is open to and will consider both internal and external candidates when filling the [Executive Title] position. Anational search will be conducted unless the board concludes that a current staff member is appropriate and available for the job.

1. In organizations such as [Organization Name], the [Executive Title] position is often shaped by the incumbent's talents and areas of specialized interest. That person's departure might necessitate other organizational changes including the creation of new positions and/or realignment of current positions.
2. The preeminent goal of a transition to a new [Executive Title] is maintaining continuity of [Organization Name] mission-related work. A transition also presents an opportunity for the organization to continue to grow and develop.

Getting Organized

In the event of a planned or unplanned leadership transition, the Board shall immediately appoint a Transition and Search Committee (Transition Committee) which shall plan and manage the transition, including the search for a new [Executive Title].

The Transition Committee shall be comprised of at least five and no more than seven members, with a minimum of four Board members that serve as the majority. Ideally these Board members will represent past, present and prospective future leaders of the board of the board. The Board may also consider appointing a staff member(s) and/or another stakeholder(s) to the Transition and Search Committee or as advisor to the Committee.


Lines of Authority and Responsibility

1. **Board:** The selection of the [Executive Title] is the responsibility of the Board.
2. **[Executive Title]:** The current [Executive Title] has the responsibility to continuously identify, encourage, and help to develop, senior managers within the organization who are qualified to meet future leadership needs, whether that be on a temporary or permanent basis. The current [Executive Title] has the responsibility to plan for the orderly transition of all senior managers.
3. **Senior Managers:** The current senior managers are responsible for developing bench strength to ensure that planned and unplanned transitions are well managed and the internal talent pool is continuously expanded.

Board Action in the Event of Vacancy in the [Executive Title] Position

1. **Organizational Assessment:** The Board and Transition and Search Committee shall take time to assess the leadership needs of the organization before the search for a new [Executive Title] is conducted. The assessment shall include a review and update (if needed) of the organization's strategic plan. The assessment will be designed to help assure the selection of a qualified and capable leader who fits well with the organization's mission, vision, values, culture, goals, and objectives, and who has the necessary skills to lead the organization.
2. **Option of Appointing an Acting or Interim [Executive Title]:** To assure the organization's operations are not interrupted while the Board assesses the leadership needs and recruits a new [Executive Title], the Board may appoint an Acting [Executive Title] from among senior executive staff or hire an Interim [Executive Title] from outside the organization if necessary.
3. **Duties of the Acting/Interim [Executive Title]:** Among such duties will be to ensure that the organization continues to operate without disruption and that all organizational commitments previously made are appropriately executed, including, but not limited to, speaking engagements, grant and contract obligations, reports, licenses, certifications, membership renewals, and other obligations to funders and other stakeholders.

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SUCCESSION PLANNING: LEADER DEVELOPMENT

Strategic Talent Management Component

BENEFIT:

**Broadens
and
Sustains
Leadership
Capacity
and
Builds
Bench
Strength**



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SUCCESSION PLANNING: DEPARTURE-DEFINED

GOAL
Increase organization's capacity to deliver its mission under new leadership, whenever the transition occurs


OUTCOMES

- Capacity-building plan strengthens the four critical elements of organizational sustainability
- Succession policy outlines the board's policies & roles for a chief executive transition
- Backup plans and cross-training for continuity



PLANNING AND CAPACITY-BUILDING
1 TO 5 YEARS AHEAD OF CHIEF
EXECUTIVE TRANSITION

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Succession Planning Mini-Assessment

Please read the following questions and note your response. As it applies to your organization, is this statement completely true (yes), partially true (part) not true at all (no) or you don't know (DK)?

Emergency Backup Plan for Executive Director/CEO	Yes	Part	No	DK
Our organization has a written emergency backup plan for the chief executive.				
This plan includes a designated first and second backup to stand in for the chief executive in case of an unplanned absence.				
There is a cross training plan to prepare the first and second backups for assuming the chief executive's key duties.				
There is a communication plan which describes who needs to know when and by whom in case of unplanned absence of the chief executive.				
Emergency Backup for Senior Managers/Key Managers or Staff	Yes	Part	No	DK
Our organization has a written emergency backup plan for senior managers/key staff.				
This plan includes a designated first and second backup to stand in for the senior manager/key staff person in case of an unplanned absence.				
There is a cross training plan to prepare the first and second backups for assuming the senior manager/staff person's key duties.				
There is a communication plan which describes who needs to know when and by whom in case of unplanned absence of the senior manager/key staff person.				
Succession Policy	Yes	Part	No	DK
Our organization has a written succession policy to guide how the Board will fill the opening in a planned chief executive transition.				
This policy states how the Transition and Search Committee is comprised and the role of the Committee.				
This policy addresses how we will handle internal candidates and what kind of search we will do to find candidates.				
This policy states our commitment to diversity and inclusiveness in our recruiting and hiring.				
Other Helpful Actions	Yes	Part	No	DK
Our organization regularly reviews and updates position descriptions.				
Our organization routinely reviews bench strength against key competencies and functions.				
Our organization unpacks jobs to make sure they have not become undoable by anyone other than current person in the position.				
Our organization has a comprehensive list of all passwords, bank accounts, IT information in one place with more than one person familiar with details.				
Our organization routinely reviews our emergency backup plans and succession policy.				

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STABILITY, SUSTAINABILITY & VITALITY

- Vitality**
 - Exuberant strength or vigor. Capacity to live, grow and develop. Powerful.
 - Engaged. Aligned. Energized.
- Sustainability**
 - Strong organizational fundamentals in place that enable the nonprofit to be a high-value asset over the long term.
 - Prerequisite for true vitality.
- Stability**
 - Basic level of health. Firmness. Enough resources to carry out short- to mid-term activities.
 - Prerequisite for sustainability.

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SUSTAINABILITY PLANNING

THE FOUR ELEMENTS


Business Model & Strategy

Resources

Leadership

Culture

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THE SUSTAINABILITY MINI ASSESSMENT

Organizational Sustainability Mini-Assessment

Please read the following questions and note your response. As it applies to your organization, is this statement completely true (Yes), partially true (Part), not at all true (No), or you don't know (DK)?

Strategy	Our organization has a solid business model (what we do and how we pay for it) that has at least 5-7 years of life in front of it and is built on quality services/products that are needed by clients and valued by donors/funders.	Yes	Part	No DK
	Our strategic or long-range plan (or business/organization strategy) is current and relevant to today's and tomorrow's market conditions.	Yes	Part	No DK
	Progress toward the plan is frequently reviewed and is the subject of priority-setting discussions.	Yes	Part	No DK
Leadership	Among the board, executive and management team, there's a high degree of alignment about the direction and strategy of the organization.	Yes	Part	No DK
	We have the staff and board leadership in place who meet our present and near-term (2 - 3 years) future leadership needs.	Yes	Part	No DK
	We have written succession plans in place for all key employees that include cross training plans.	Yes	Part	No DK
	We have a strategy in place to recruit, develop and deploy new leaders, both staff and board.	Yes	Part	No DK
Resources	Our chief executive could go on a 3-6-month sabbatical tomorrow and the organization would not miss a beat.	Yes	Part	No DK
	Our board is a high-value asset to the organization.	Yes	Part	No DK
	Processes are in place and followed for orientation of new board members.	Yes	Part	No DK
	We have a pipeline of board leaders and a process for board officer succession.	Yes	Part	No DK
	Our organization has sufficient financial resources to meet its commitments in the short to mid-term (3 - 12 months).	Yes	Part	No DK
	Our organization's funding or revenue streams have longevity – the majority are likely to continue beyond the current year's budget or current grant cycle.	Yes	Part	No DK
Culture	We have an appropriate degree of diversification of revenue streams.	Yes	Part	No DK
	A proactive resource development strategy is in place that is tuned to our organization's particular market – the present market as well as future market.	Yes	Part	No DK
	There is a clear logical link between our revenue development strategy and our overall business/organization strategy.	Yes	Part	No DK
	Good stewardship of the organization's assets – financial assets as well as "soft and social capital" – are strengths that underpin the organization's work, such as community reputation, human capital, intellectual property, systems and processes, etc.	Yes	Part	No DK
Culture	Our organization's culture could be described as resilient, forward-focused, results-oriented and action-based.	Yes	Part	No DK
	The value and worth of the organization is widely understood throughout the board, staff and volunteers.	Yes	Part	No DK
	Virtually anyone on the team could make a compelling case for supporting the organization.	Yes	Part	No DK

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WHY DO SUSTAINABILITY AND SUCCESSION PLANNING?



- Ensures continuity**
- Builds bench depth and internal capacity**
- Key responsibility of top leadership; can't be delegated**
- Best if involvement is broad-based and connected to ongoing succession planning**
- Minimizes crisis of an unplanned absence**
- Identifies "organizational gaps" in coverage**

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COMING TO TERMS WITH CHANGE

Ending:

- Loss
- Letting Go
- Relinquishing Old Way & Old Identity

Neutral Zone:


- Confusion
- Direction Finding
- Re-patterning

New Beginning:

- Commitment
- Rebirth
- New Energy
- New Sense of Purpose

Source: Bridges, William. *Managing Transitions: Making the Most of Change*. 2nd ed. Cambridge, MA: Perseus Pub., 2003.

21



CEO PROCESS OVERVIEW

Prepare

Organize & Tailor the Process

Gather Information

Engage the Board

Develop Profile & Search Plan

Board clarity and alignment about the four factors critical to the search and transition.

Search

Launch the Search

Recruit

Screen

Select

Hire

An exceptional executive selected – who fits the current and future leadership needs of the organization.

Onboard

Onboard

Relate

Evaluate

Support

Board-executive alignment on priorities, roles and performance measures.

OUTCOME: Increased capacity to deliver organization's mission under new leadership.



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THE NEXT STEPS WORKSHOP

Nonprofit CEOs
A Next Steps Planning Workshop

**Sustainability, succession, and transition planning
for founders and long-tenured executives**

July 27-28, 2015 – Baltimore, MD

More information: Melody Thomas
mthomas@raffa.com
(202) 955-7242

**A
Two-Day
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Workshop**

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THE NEXT STEPS WORKSHOP

What Others Are Saying!

Read for yourself



THE BIG HITS!

- Peer Insights
- Small Breakouts
- Reflection Time
- Action Planning
- What's Next
- Presentations
- Resources




"Absolutely necessary for any leader considering this stage in their life as well as the sustainability of their organization." (G. Italiano)

"An extremely valuable investment of my time and resources. Next steps is an eye-opening venture into solid planning both for healthy, viable organizations as well as those going through challenging changes." (P. Haynes)

"This workshop helped me to clarify and bring into focus my understanding of the transition process. I feel ready to develop my plan and set a date." (G. Overduff)

"Being both a long-term executive and a founder, I found the next steps workshop very helpful. I learned much from the experience and knowledge of the presenters, facilitators and literature. For me, taking care of myself and focusing on where I was helped to focus on the process and challenges. Fellow 'journeymen' sharing their issues and stages made it more enlightening as I applied it to myself." (R. McMahon)

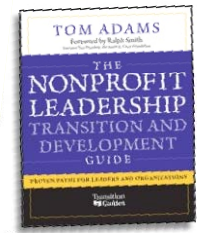
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RESOURCES

For a better-run, better-prepared nonprofit that's positioned for ongoing mission impact and success!

- **The Nonprofit Leadership Transition And Development Guide Includes:**
 - Leadership Transition and Leadership Development
 - Strategic Succession Planning
 - Three Critical Stages of Transition
 - Fortune 500 Talent Management Methods
- **Order via Amazon.com**
 - Kindle Edition: \$25.49
 - Paperback: \$34.29



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DISCUSSION

**QUESTIONS
AND
OPPORTUNITIES**




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Tom Adams, Director
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202.955.7245

Thank you



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Succession Planning Mini-Assessment

Please read the following questions and note your response. As it applies to your organization, is this statement completely true (yes), partially true (part) not true at all (no) or you don't know (DK)?

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Our organization has a written emergency backup plan for the chief executive.	Yes	Part	No	DK
This plan includes a designated first and second backup to stand in for the chief executive in case of an unplanned absence.	Yes	Part	No	DK
There is a cross training plan to prepare the first and second backups for assuming the chief executive's key duties.	Yes	Part	No	DK
There is a communication plan which describes who needs to know when and by whom in case of unplanned absence of the chief executive.	Yes	Part	No	DK

Emergency Backup for Senior Managers/Key Managers or Staff				
Our organization has a written emergency backup plan for senior managers/key staff.	Yes	Part	No	DK
This plan includes a designated first and second backup to stand in for the senior manager/key staff person in case of an unplanned absence.	Yes	Part	No	DK
There is a cross training plan to prepare the first and second backups for assuming the senior manager/staff person's key duties.	Yes	Part	No	DK
There is a communication plan which describes who needs to know when and by whom in case of unplanned absence of the senior manager/key staff person.	Yes	Part	No	DK

Succession Policy				
Our organization has a written succession policy to guide how the Board will fill the opening in a planned chief executive transition.	Yes	Part	No	DK
This policy states how the Transition and Search Committee is comprised and the role of the Committee.	Yes	Part	No	DK
This policy addresses how we will handle internal candidates and what kind of search we will do to find candidates.	Yes	Part	No	DK
This policy states our commitment to diversity and inclusiveness in our recruiting and hiring.	Yes	Part	No	DK

Other Helpful Actions				
Our organization regularly reviews and updates position descriptions.	Yes	Part	No	DK
Our organization routinely reviews bench strength against key competencies and functions.	Yes	Part	No	DK
Our organization unpacks jobs to make sure they have not become undoable by anyone other than current person in the position.	Yes	Part	No	DK
Our organization has a comprehensive list of all passwords, bank accounts, IT information in one place with more than one person familiar with details.	Yes	Part	No	DK
Our organization routinely reviews our emergency backup plans and succession policy.	Yes	Part	No	DK

Organizational Sustainability Mini-Assessment

Please read the following questions and note your response. As it applies to your organization, is this statement completely true (yes), partially true (part), not at all true (no), or you don't know (DK)?

Business Model/Strategy	Our organization has a solid business model (what we do and how we pay for it) that has at least 5-7 years of life in front of it and is built on quality services/products that are needed by clients and valued by donors/funders.	Yes	Part	No	DK
	Our strategic or long-range plan (or business/organization strategy) is current and relevant to today's and tomorrow's market conditions.	Yes	Part	No	DK
	Progress toward the plan is frequently reviewed and is the subject of priority-setting discussions.	Yes	Part	No	DK
	Among the board, executive and management team there's a high degree of alignment about the direction and strategy.	Yes	Part	No	DK
Leadership	We have the staff and board leadership in place who meet our present and near-term future leadership needs.	Yes	Part	No	DK
	We have written succession plans in place for all key employees that include cross training plans.	Yes	Part	No	DK
	We have a strategy in place to recruit, develop and deploy new leaders, both staff and board.	Yes	Part	No	DK
	Our chief executive could go on a six-month sabbatical tomorrow and the organization would not miss a beat.	Yes	Part	No	DK
	Our board is a high-value asset to the organization.	Yes	Part	No	DK
	Processes are in place and followed for orientation of new board members and we have a pipeline of leaders and a process for board officer succession.	Yes	Part	No	DK
Resources	Our organization has sufficient financial resources to meet its commitments in the short to mid-term.	Yes	Part	No	DK
	Our organization's funding or revenue streams have longevity – the majority are likely to continue beyond the current year's budget or current grant cycle.	Yes	Part	No	DK
	We have an appropriate degree of diversification of revenue streams.	Yes	Part	No	DK
	A proactive resource development strategy is in place that is tuned to our organization's particular market – the present market as well as future market.	Yes	Part	No	DK
	There is a clear logical link between our revenue development strategy and our overall business/organization strategy.	Yes	Part	No	DK
	We are good stewards of ALL of the organization's assets, financial assets as well as "soft and social capital," the strengths that underpin the organization's work, such as community reputation, human capital, team capital, systems and processes, intellectual property, etc.	Yes	Part	No	DK
Culture	Our organization's culture could be described as resilient, forward-focused, results-oriented and action-based.	Yes	Part	No	DK
	The value and worth of the organization is widely understood throughout the board, staff and volunteers. Virtually anyone on the team could make a compelling case for supporting the organization.	Yes	Part	No	DK



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Transition
Guides
joins Raffa, P.C.!

Next Steps Workshop Testimonials

"This workshop helped to clarify and bring into focus my understanding of the transition process. I feel ready to develop my plan and set a date."

Gretchen Overdurff, Greenbelt Homes

"Provides substantive, specific information to help think productively about planning, managing, and leaving an organization in the best way possible."

Myrl Weinberg, National Health Council

"This information is hard to find, so take advantage of the offering of resources, materials, and networking. It's well worth the money and time."

Betsy Mitchell, Montessori School of Northern Virginia, Inc.

"A very worthwhile investment in time and money. The training provided me great clarity on my steps towards leaving the organization."

Terry Rubenstein, Joseph and Harvey Meyerhoff Family Funds

"Exceedingly valuable session. I expected a lot but it greatly exceeded my expectations. I feel motivated and focused on what to do next."

Trudy McFall, Homes for America

"TransitionGuides' training provides resources ideas, and support. Well worth the investment. Thank you so much for an excellent program."

Pam Bryer, Maternal and Child Health Consortium of Chester County, PA

Register Early:
Enrollment is limited
to 20 participants!

Registration includes continental breakfast and lunch, comprehensive resource materials, a workbook, 1 complimentary book, and a 30-minute coaching session.

Next Steps Workshop Personal and Organizational Succession Planning

Explore tools for executive succession and transition, presented in a confidential environment.

Are you thinking about leaving your chief executive position within the next 1-5 years?

Exclusively for nonprofit chief executives, Raffa's Next Steps Workshop offers a safe and confidential space to explore best practices in organizational sustainability, leadership succession, and chief executive transition.

Our two-day workshop focuses on you, your legacy, and how to prepare yourself, your organization, your staff, and your board for your eventual departure. These "tough-to-talk-about" topics are skillfully guided by national experts who have helped more than 500 executives – with tenures ranging from 5 to 35 years – ensure that their hard work and legacies endure.

Register for the following workshops:

July 27-28, 2015

Annie E. Casey Foundation, Baltimore, MD

Early Bird: \$400 (before 6/15/2015)

Regular: \$495 (after 6/15/2015)

[Register Today! Click Here](#)

January 25-26, 2016

Meyer Foundation, Washington, DC

Early Bird: \$400 (before 12/1/2015)

Regular: \$495 (after 12/1/2015)

[Register Today! Click Here](#)

Next Steps features:

- **Three Vital Tools:**
 1. Organizational Sustainability Planning
 2. Leadership Succession Planning
 3. Executive Transition Management
- **Two Tracks:**
 1. Preparing Yourself
 2. Preparing Your Organization
- **Roles** - Discussion of executive, board, and staff roles.
- **Communications** - Advice on the who, how, and when.
- **Small Groups** working with experts and peers.
- **A Post-Workshop Coaching Call** with a facilitator.

You'll leave Next Steps with:

- **Clarity** about where you are - personally, professionally and organizationally - with succession and transition and what's next for you beyond transition.
- **A High-Level Action Plan** for transition, capacity building, and sustainability.
- **Tools & Guides** you can tailor to your needs.
- **A Rich Understanding** of what will be required of yourself, your organization, and your board.
- **Your Concerns Addressed** by hearing from peers who have successfully transitioned.
- **New Ideas** for building team diversity and strength.

Registration is now open for the workshops, visit:

www.Raffa.com/Learning/Pages/FeeBasedClasses.aspx