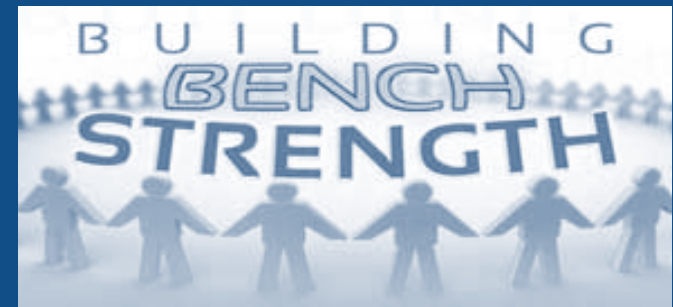


BUILDING YOUR BENCH STRENGTH THROUGH SUCCESSION PLANNING



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WHY PLAN FOR SUCCESSION?

Mitigates Risk to Mission Impact

Key Board Responsibility

Ensures Organizational Sustainability

Enhances Success for New Leaders

Leadership Development: Builds your Bench Strength

Gets us beyond an ugly truth that we avoid:



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

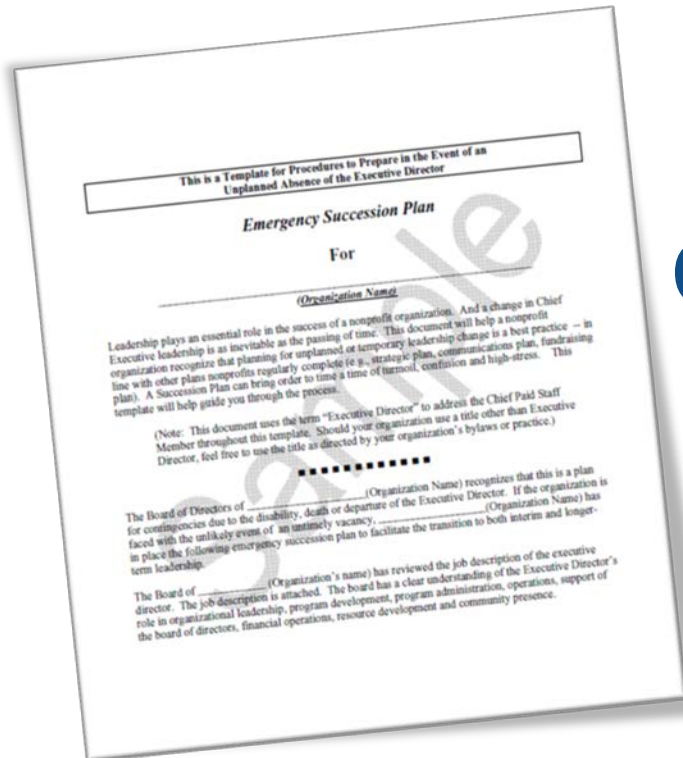


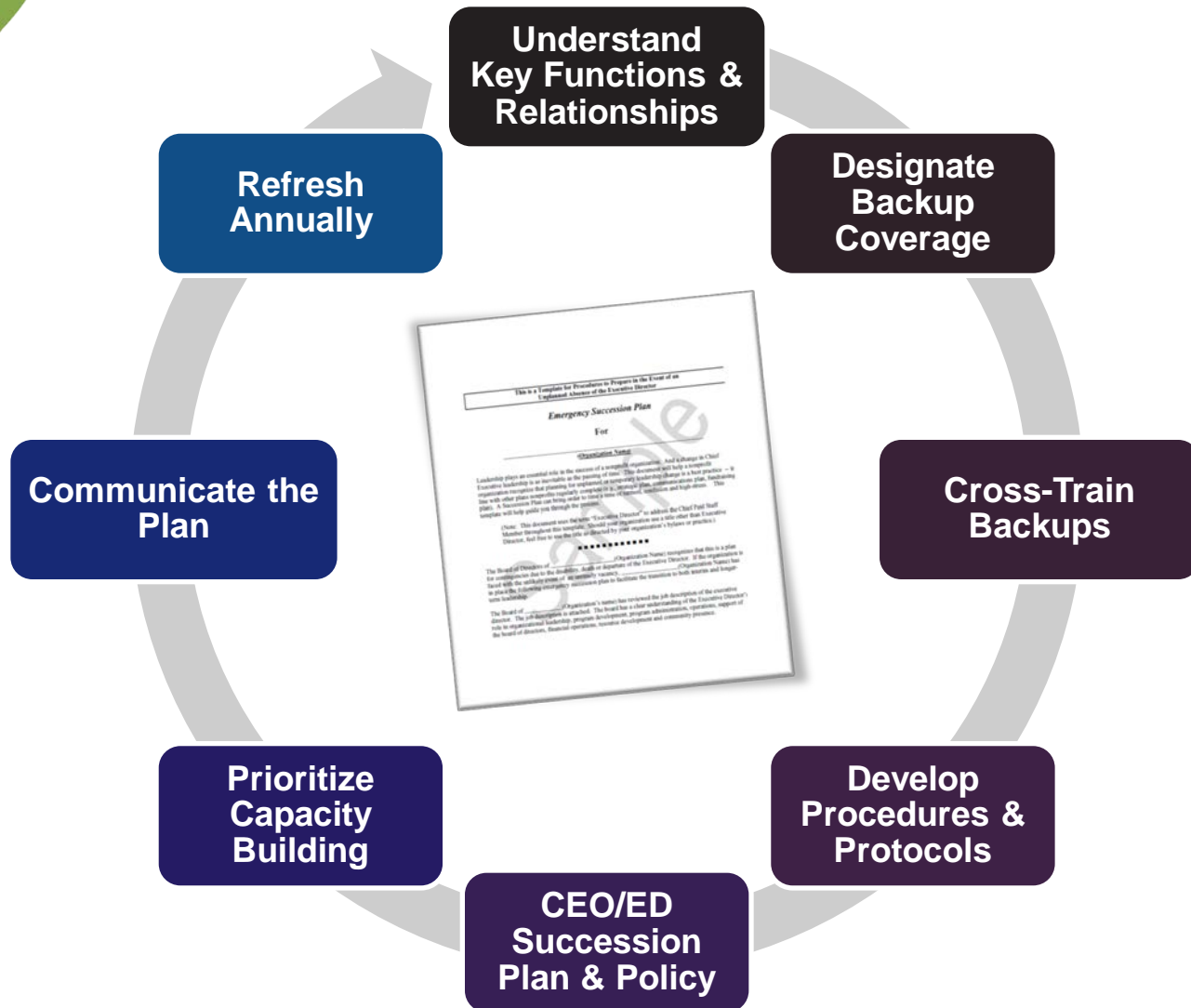
Succession planning:

- Is an ONGOING process for developing internal people to fill key functions across the organization.
- Increases the number of employees that are prepared to assume key roles.
- Enhances retention and morale

The “Essentials”

Emergency Backup Plans and CEO/ED Succession Policy





1. When was the last time your job description was updated or revised?
2. Are there any changes that need to be made to better reflect your key functions and responsibilities?
3. Should anything be removed from the list of functions or responsibilities?
4. Should anything be added to the list of job functions or responsibilities?
5. How do the job responsibilities bear out in action?





BENCH STRENGTH WORKSHEET: SAMPLE TEMPLATE

Job Description Walkthrough

1. When was the last time your position description was updated, revised or refreshed?
2. Are there any changes that need to be made to better reflect "actual" responsibilities?
3. Is there anything that should be removed/added the job responsibilities?
4. How do the job responsibilities bear out in action?

Key Functions and Time Allocations

Key Functions	Time Allocation

Critical Meetings and Time Commitment

MEETINGS	TIME COMMITMENT

Relationship Management

Most critical relationships (primary/sole relationship manager)

Future Projects of Initiatives

PROJECTS/INITIATIVES	LAUNCH

Overview

The Arc Prince George's County (The Arc) contracted with Raffa, P.C. (Raffa) to conduct a Bench Strength Review of the Senior Management Team, including the Executive Director, for the purpose of informing the organization's leadership transition process. This project entailed a high-level scan of the roles and responsibilities of the senior team to identify gaps in backup support for each team member and the strengths and challenges related to the capacity of the senior management team. The report can be used to inform decisions regarding the revision of job descriptions, professional development needs of team members, and the staffing structure of the senior team. The report also highlights any risks affecting leadership continuity on the senior team.

Methodology

Each senior staff member completed a thorough bench strength query tool and participated in an individual 60-90 minute phone interview with Raffa's staff. The following positions participated in the process:

- Executive Director
- Director of Administration
- Director of Day Services
- Director of Employment Services
- Director of Family and Community Supports
- Director of Finance
- Director of Human Resources
- Director of Nursing
- Director of Residential Services

Key Findings

The following are key findings from the review.

- Given that job descriptions have evolved over time, an intentional effort should be made to update all job descriptions to accurately reflect the current roles and responsibilities of each position.

EMERGENCY BACKUP WORKSHEETS: KEY FUNCTIONS AND DESIGNEES

Explore the key functions of your role. List the key functions and designate staff who can carry out the key functions.

Key Functions	Designated Backup(s)



Identify **first and second** backup designees



EMERGENCY BACKUP WORKSHEETS: RELATIONSHIP MANAGEMENT

List the individuals, groups, or entities with which the organization must maintain relationships. Include the relationships where you are the sole or primary contact.

Critical Relationships	Contact Information/Location



EMERGENCY BACKUP WORKSHEETS: CROSS-TRAINING PRIORITIES

Explore the cross-training needs of the organization and for your position.

Top Three Priorities	
The Organization	My Position
1.	1.
2.	2.
3.	3.



EMERGENCY BACKUP WORKSHEETS: CROSS-TRAINING PLAN

Explore the detailed cross-training needs for your position.

Staff For Training	Training Provider	Training Required	Training Timeline

Board-approved guidelines to handle an executive departure

Statement of commitment:

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

Addresses:

- Plan to appoint interim leadership
- Who is responsible during unexpected absence
- Who is on search committee
- Guiding principles for the search





Ensure continuity of mission impact

Revise job descriptions for real reflection of position

Minimize crisis of an unplanned absence

Identify “functional gaps” in coverage

Increased staff retention

Build bench depth and internal capacity

Everyone sleeps better at night

PROGRAM

INFORMATION SESSION



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Thank you