



# Stronger Economies Together

Doing Better Together

Leadership and Sustainability

Lionel J. Beaulieu, Purdue Center for Regional Development, Purdue University

# LEADERSHIP: MAINTAINING A VIBRANT SET REGIONAL TEAM

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## OVERVIEW

Purpose: During this session, participants will:

- Take stock of the problems that have occurred in some regions in terms of the SET Program
- Offer an effective structure for making sure the work of the SET team gets done
- Identify ways to keep counties actively involved in the SET Program

Estimated Time to Complete: 2.5 hours

Materials Needed:

- Nametags
- Name tents
- Sign in sheets
- Flip charts
- Markers

Handouts:

- Handout 1 Readiness Assessment
- Handout 2 What Succession Strategies Should We Use?

**SLIDE 1**  
**INSTRUCTIONS**

This slide that introduces the topic for this session.

Have this slide showing on the screen prior to the start of the SET Planning Team meeting.

Introduce the topic as you begin.



SLIDE 1

TIME: 5 MINS

SUPPLIES:

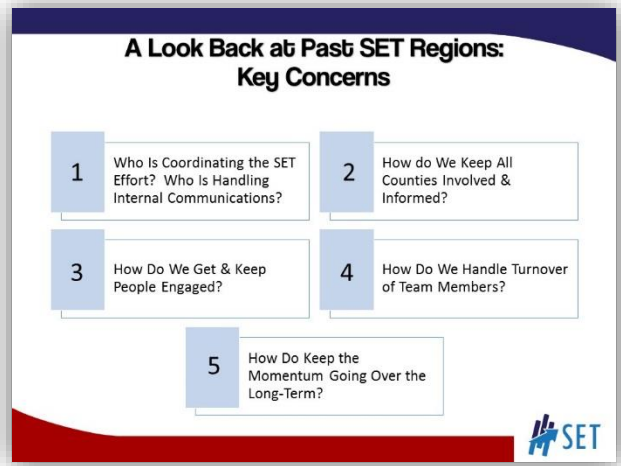
HANDOUTS:

**SLIDE 2**  
**INSTRUCTIONS**

**Goal:** Take stock of the problems that have occurred in some regions in terms of the SET Program

**Instructions:**

The SET program has been in place for over five years and as such, some valuable insights have been collected on what has gone well – and what bumps the program has experienced. This module is intended, in part, to tackle these issues head-on, problems that could compromise the long-term sustainability of the SET regional team. Five key concerns that past SET regional teams and coaches have identified are examined as well as ideas on how to avoid these issues from cropping up with your regional team.



SLIDE 2

TIME: 5 MINS

SUPPLIES:

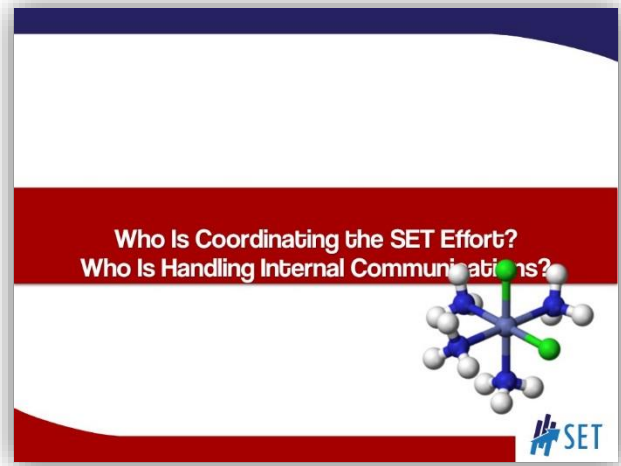
HANDOUTS:

## SLIDE 3

## INSTRUCTIONS

**Goal:** Review the first concern identified by some past SET participants

**Instructions:** Examine the first concern: "Who is managing the activities of the SET team and how is communication with the team being managed?" After recruiting people to serve on the planning team, providing a clear understanding of responsibilities and expectations of each member of the team is important. Furthermore, knowing who will take the lead role in keeping all members of the team fully informed, especially members who were unable to take part in a recent meeting of the SET Planning Team is vital.



SLIDE 3

TIME: 5 MINS

SUPPLIES:

HANDOUTS:

## SLIDE 4

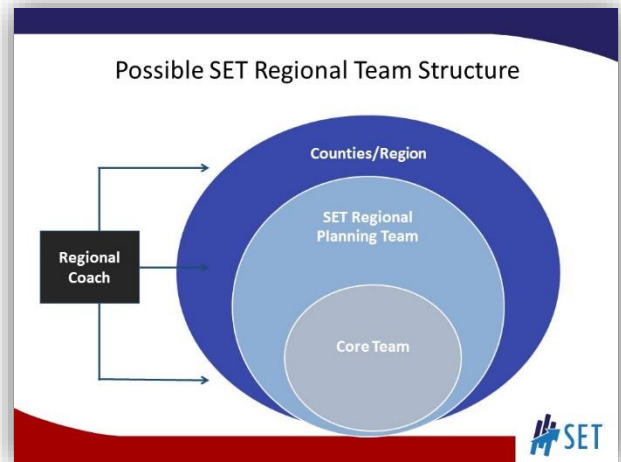
## INSTRUCTIONS

**Goal:** Offer an effective structure for making sure the work of the SET team gets done.

**Instructions:** While there is no one single model that works, the model depicted in this slide has been useful in previous SET regions. The structure is made up of four related pieces.

- **Regional Planning Team:** First, having a strong Regional Planning Team is essential – one that has an active and representative group of individuals drawn from the target region. The number of people in this group is somewhat dependent on the number of counties, but should have representation from each county across a broad mix of perspectives. These should be people who are willing to attend and actively participate in team meetings.
- **Core Team:** In order to make sure meetings run smoothly, the Planning Team may want to select a subset of its members to serve on a Core Team. Ideally, this Core Team has at least one person from each county in the region to help serve as a point person.
- **Counties in the region:** In order to gain buy-in on the work of the SET team, keeping people in the region informed of the key efforts of the regional team is important.
- **Regional Coaches:** The land-grant and Rural Development professionals guiding the SET team.

The next series of slides expand on the vital role that each of these entities plays in advancing the success of the SET regional team over the long-term.



SLIDE 4

TIME: 5 MINS

SUPPLIES:

HANDOUTS:

**SLIDE 5**  
**INSTRUCTIONS**

**Goal:** To detail the key responsibilities of the Regional Planning Team

Typically this group is made up of individuals that came together to apply for entry into the SET program, along with other partners added since being chosen to be part of the national SET program. The diagram outlines EIGHT key responsibilities associated with the work of the Planning Team. Additional responsibilities may be added by the team.

**Participate in the SET team meetings:** It is hard for the team to make much progress on developing and implementing a sound regional plan if participation of SET team members is spotty. While it is not uncommon for some members to miss a meeting because of a work or family emergency, it's important to find a time for ALL planning team members to attend all meetings. If members start failing to attend, it's an early warning sign that something is just not right. In order to get the important regional work off the ground, regular attendance at meetings of the team is essential.

**Contribute personal and professional knowledge:** Each member of the Planning Team was selected because they bring a unique and valuable perspective to offer to the team. So, it's important for each person on the team to share his/her personal knowledge of the communities and counties that make up the SET region. Furthermore, the professional knowledge and expertise team members bring to the group can help guide and inform the overall work of the team.

**Identify local resources to support SET:** Each member of the team has developed important relationships with individuals, organizations and local institutions that can be tapped to support one or more components of the SET program. When appropriate, each member should be willing to help connect these resources and assets for the purpose of advancing the goals and strategies that the SET team has developed for the region..

**Plan the Civic Forum:** One of the first challenges the SET regional team will face is to coordinate and sponsor a Civic Forum in 1-2 places in the region. Hosting such an event – one that offers local residents an opportunity to share their hopes and aspirations for the region – requires a good bit of planning in order to ensure that the event is well attended and is conducted in an organized and effective manner. So, it is important that all members of the SET regional team play an active part in hosting a successful forum.

**Input on goals and strategies:** The SET program introduces the regional team to a variety of tools that it can use to gain some clarity regarding the opportunities and challenges existing in the region. These include in-depth data on the region, input from local residents taking part in the Civic Forum, and the mix of assets that exist in the region. Taken as a whole, these and other resources provide a foundation for determining what major goals the SET team will pursue. The decision on what goals should be given priority attention is driven by the SET regional team. That means that all members of the team have to weigh in and offer their views of what goals and strategies should be considered for inclusion in a regional economic development plan and offer a sound explanation as to why.

**Finalizing goals and developing action plans:** After discussion of the goals and strategies, the team has to come to an agreement on what goals it will embrace as part of the regional plan and how it's going to get the job done in terms of achieving those goals. It's incumbent that each team member be willing to step and volunteer to fine tune the plans associated with the priority goals and to actively participate in putting the team's plan into action.

**Keep counties informed:** By design, SET team members are drawn from the counties that have agreed to form the SET Regional Team. As such, it is essential that each team member serve as a conduit for keeping his/her county leaders informed of the work of the SET team. By taking steps to keep local leaders in the loop, the likelihood of garnering their support for the regional plan the SET team develops is likely to be much stronger.

**Serve as a positive voice:** If past history in any indication, there are likely to be naysayers when it comes to the development and implementation of a solid regional economic development plan. SET team members should be strong advocates for the value and importance of the SET initiative.



SLIDE 5

TIME: 10 MINS

SUPPLIES:

HANDOUTS:

**SLIDE 6**  
**INSTRUCTIONS**

**Goal: Highlight the responsibilities of the Core Committee**

Because a successful SET program requires attention to a good bit of details, it may be a worthwhile for the regional team to form a Core Committee – a small group of individuals drawn from the Regional SET planning team that is willing to manage the logistics associated with the maintenance of an active and engaged regional team. Here are some of the key responsibilities the Core Team may carry out:

Meeting logistics: Coordinate the dates, times and location of the regular SET team meetings and handle the preparatory work for the team’s hosting of the Civic Forum.

Local and External Assets/Resources: Coordinate the work of the SET regional team when it comes to tapping the local and external resources needed to enhance both the work of the team and its capacity to achieve the regional goals.

Communications: Work with the regional coach to keep all members in the loop regarding upcoming meetings and provides the necessary documents team members need to be well prepared to be an active contributor to the upcoming meetings of the regional group.

High Quality Plan: It is difficult for any regional plan to be written by a large committee. More often than not, a smaller team of committee members will be charged with the responsibility of putting a strong regional plan together after the entire SET regional team has weighed in. The Core Team can serve in this role, or the full membership of the regional team may opt to create a sub-committee to draft an initial draft of the plan.



SLIDE 6

TIME: 5 MINS

SUPPLIES:

HANDOUTS:

Prepare/Submit Reports: Given that SET has been funded by USDA Rural Development, it is important for the Core Team to offer feedback to the State Resource Team on how well the SET program is going in the region. In addition, the Core Team is urged to partner with the Regional Coach to prepare and submit all reports needed to track the progress and success of the SET program in the region.



## SLIDE 7

## INSTRUCTIONS

**Goal: Outline the responsibilities of the Regional Coaches**

The Regional Coaches function as links between the SET Regional Planning Team and the State Resource Team. The coaches offer an objective assessment of the work of the team and try to ensure that the work for the team stays on track. While the major responsibilities of the coaches are noted in the slide, the following points offer additional insights regarding the activities of the coaches:

- The coach works with both the Core and Planning Team members, but is likely to interact more frequently with the Core Team as a way to make sure that the work of the planning team is progressing at a good pace.
- If the Planning Team does not have a good mix of local residents involved in the SET program, the coach will express this concern to the team and will urge that additional people be added to the team in order to broaden team representation.
- Aside from the Civic Forum, the coach recommends that the public be asked to offer feedback to the Planning Team at various times as it continues to work on developing and putting the finishing touches on a high quality economic development plan.
- As the team establishes its regional goals and action plans, the coach may ask some challenging questions to make sure the team has given consideration to the benefits and costs associated with the goals and strategies selected.
- Finally, as the team achieves consensus on its regional plan, the coach will help the team assess how well its plan incorporates the essential elements of a high quality plan.



SLIDE 7

TIME: 5 MINS

SUPPLIES:

HANDOUTS:

## SLIDE 8

## INSTRUCTIONS


**Goal: Note the importance of inviting the public to weigh in on the activities of the Regional Team**


The SET program takes seriously the need to invite residents in the region to offer input and feedback on regional needs and opportunities. A new component of the SET program introduced in Phase V is the hosting of a Civic Forum by the Regional Planning Team. The success of the forum depends, in part, on the willingness of the public to attend and share their perspectives on the strengths and challenges existing in the region. As one of the first significant activities conducted by the Regional Planning Team, the input provided by local residents during the course of the Civic Forum serves as one of the important pieces of information that the Planning Team will study as it formulates a regional economic development plan.

But, the public's involvement should not be limited to its participation in the Civic Forum. Residents in the region should be invited to share their opinions at various times during the Planning Team's deliberations. This includes offering feedback on some of the initial drafts of the regional plan and stepping up to help implement some of the activities included in the plan. If some members of the SET Planning Team rotate off the team, local residents with an active interest in being part of the Regional Team should submit their name for consideration as a new member of the team.

### Community Residents: Their Roles

- Take an active part in the Civic Forum
- Provide input on the issues and opportunities in the region
- Offer feedback on drafts of the high quality plan.
- Volunteer to be actively involved in the major initiatives of the SET regional plan.
- Serve as a source of new SET Regional Team membership





SLIDE 8

TIME: 5 MINS

SUPPLIES:

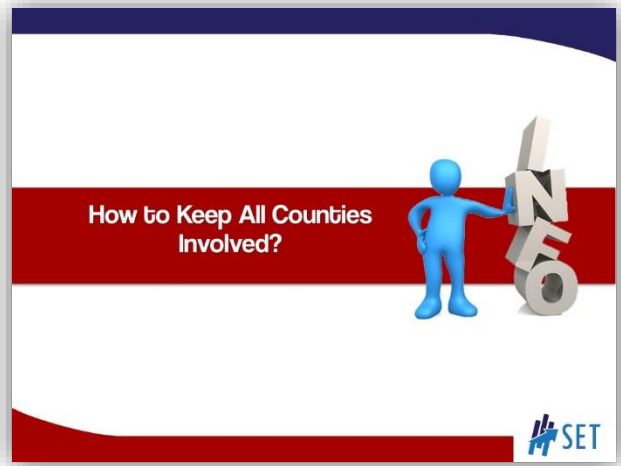
HANDOUTS:

SLIDE 9

INSTRUCTIONS

**Goal:** Share insights on how to keep all counties involved in the work of their regional team

**Instructions:** This transition slide sets the stage for the next segment.



SLIDE 9

TIME: 1 MIN

SUPPLIES:

HANDOUTS:

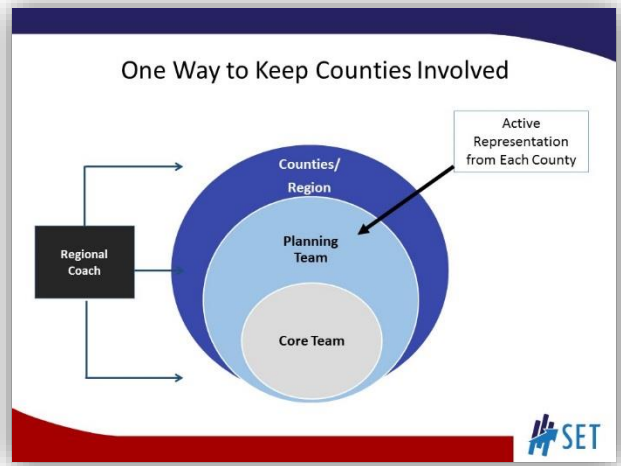
**SLIDE 10**  
**INSTRUCTIONS**

**Goal: Identifying ways to keep counties actively involved in the SET Program**

One obvious way to keep all counties actively involved in the region team is to ensure representation from each of these counties (parishes) to serve on the Planning Team.

Additionally, each county should have a liaison (possibly a core team member) that is responsible for maintaining two-way communication between their county leaders and the SET Planning Team. Not only should they offer insights to the Planning Team regarding the needs of their county, they should provide periodic updates to county leaders and residents about the valuable work being undertaken by the Planning Team.

Another way to keep counties involved is to rotate Planning Team meetings, visiting each of the counties that have banded together to form the SET region. The site visit can be coordinated by the SET Planning Team members from that county. The value of rotating the SET meetings is that the Planning Team members can gain a better understanding and appreciation of the diverse needs and assets existing across the whole region – insights that can give shape to some of the elements that ultimately get incorporated into the regional economic development plan.



SLIDE 10

TIME: 5 MINS

SUPPLIES:

HANDOUTS:

**SLIDE 11**  
**INSTRUCTIONS**

**Goal: Give attention to the third concern frequently expressed by past SET regional teams --- how to attract and retain the right people to be part of the SET initiative.**



SLIDE 11

TIME: 1 MIN

SUPPLIES:

HANDOUTS:

## SLIDE 12

## INSTRUCTIONS

**Goal: Recruit Team Members Who Represent a Diversity of People and Organizations**

The million dollar question is “Who are the right people to be on the SET Regional Planning Team?” The word “right” is not intended to imply that only those with influence or serving in elected or appointed positions should be on the Planning Team. Rather, it means that the effectiveness of the Planning Team depends, in part, on recruiting people who represent the population and income diversity of the region, as well as individuals drawn from a wide array of organizations and institutions in the region. The diagram presents the type of representatives that could be invited to serve on a Planning Team.

Attracting a diverse group of individuals to be part of the Planning Team usually means agreeing on the goals and strategies to be incorporated into the regional plan. A good mix of people working on the Planning Team ensures that different experiences, values, and aspirations are explored in the process. Additionally, the Planning Team increases the likelihood of gaining support for the plan by people and groups in the region if the team is genuinely reflective of the region.

**Reference:**

Dabson, B. (2006). *Eight principles for effective rural governance and how communities put them into practice*. Columbia, MO: Rural Policy Research Institute. Retrieved from [www.rupri.org/Forms/RGIreport.pdf](http://www.rupri.org/Forms/RGIreport.pdf).



SLIDE 12

TIME: 5 MINS

SUPPLIES:

HANDOUTS:

## SLIDE 13

## INSTRUCTIONS

**Goal: Keep individuals with power and influence informed of the activities of the SET Planning Team**

In general, the level of influence that individuals have in local decisions is dependent upon where they are located in the local leadership hierarchy. Leadership in most communities forms a structure much like a pyramid. The leadership and influence that an individual provides is generally a function of that person's location in the leadership hierarchy. The four levels of leadership can be categorized as **legitimizers**, **implementers**, **doers**, and the **general public**. It is the legitimizers who are positioned at the highest rung of the local leadership structure, while the general public is situated at the bottom level of the hierarchy.

It is important for the SET Regional Team to be knowledgeable about individuals who have some influence on what and how things get done in the region and its counties. Keeping these people informed on a regular basis of the progress the SET team is making in the development of a solid regional economic development plan is critical. It can improve the chances that the plan will be supported by these key leaders once the plan is finalized and implemented.

The following provides more detail on each of these leadership levels.

**Legitimizers**, as the name implies, refers to those individuals in the community who provide the approval necessary to guarantee the success of important projects or initiatives. In most instances, they weigh in on activities that have important implications for the community. Though they may not become actively involved in all local or regional matters, their endorsement is often essential if the SET Planning Team hopes to be successful in pursuing regional goals and strategies. In many instances, these top community influential are employed in important positions within the business, industrial, financial and governmental sectors in communities and counties that make-up the SET region. Their influence is, in no small measure, due to the significant human, physical and financial resources which they control or have access to. These resources can be mobilized to either support or limit the success of key local projects or activities.

**Implementers** form the second level of leadership in a community and they tend to be more active participants in local projects. Their involvement is often limited to areas in which they possess technical and/or professional expertise. Their key function is to implement the plans and decisions arrived at or approved by the legitimizers. Given their active involvement in local projects, they tend to acquire high visibility in the eyes of many local residents.



SLIDE 13

TIME: 10 MINS

SUPPLIES:

HANDOUTS:

The third leadership level in the community is that of the **doers**. They perform many of the chores associated with a project, such as stuffing envelopes, making and answering phone calls, distributing information, and rallying support of local residents behind the project. While they are seldom

Finally, we have the **general public**. In most cases, they remain removed from active involvement in local activities. Nonetheless, they do constitute an important aspect of the locality that must be given due consideration in important decisions, particularly those directly affecting them. The general public includes a sizable number of people who never become involved in public issues, and another segment that will be involved on an occasional basis, especially if issues or policies directly affecting them are being considered.

The use of a **pyramid design** to visually portray leadership and influence on the local level is no accident. The pyramid suggests that the most influential level (legitimizers) is made up of a small number of people in the community. Implementers are more numerous than legitimizers, but less so than the doers. And finally, the general public is the largest group in the pyramid, but the one least actively involved in local decisions.

**SLIDE 14**  
**INSTRUCTIONS**

**Goal: Address the Fourth Concern of Past SET Regional Teams Regarding Turnover of Members**



SLIDE 14

TIME: 5 MINS

SUPPLIES:

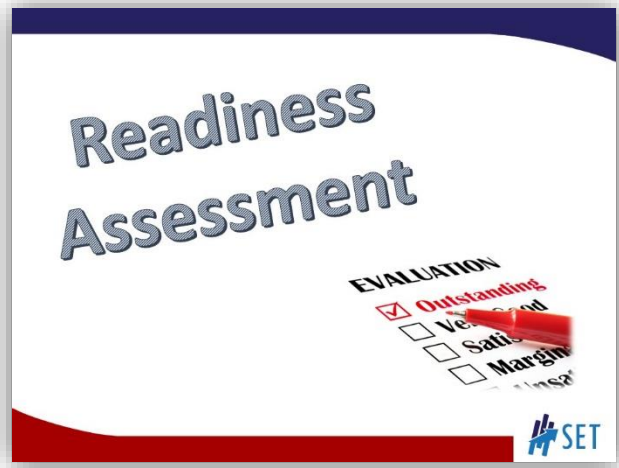
HANDOUTS:



**SLIDE 15**  
**INSTRUCTIONS**

**Goal:** Have the SET Team take a careful look at how well it has prepared for member turnover

Before discussing the question of handling turnover of team members, have the group do a self-assessment of what steps it has taken, if any, to proactively manage the turnover of team members.



SLIDE 15

TIME: 5 MINS

SUPPLIES:

HANDOUTS:


**SLIDE 16**  
**INSTRUCTIONS**

**Goal: To complete the self-assessment tool of the team’s succession planning preparation**

Ask each member of the SET team to complete this brief readiness assessment. When done, compile the number of “Yes” and “No” responses to the 9 items. Have the group discuss the results. Ask them to discuss their readiness to handle turnover of team members, or to manage the smooth transition of members leaving and joining the SET team.

**Succession Planning: Rating Your Readiness**

	YES	NO
1. Our team has a succession plan in place		
2. If a team leader is unable to serve, we have a person(s) identified to take over		
3. The team can succeed without the current team leader(s)		
4. If the team leader was to leave, the team would retain the institutional knowledge		
5. Our group knows the external people and groups to contact if the leader leaves		
6. We have job descriptions for all key leaders of our team		
7. Individuals have been mentored to step into positions on the SET team when they become open		
8. We select new team members based on how they can help achieve our long-term goals		
9. We are actively developing leadership from within our team so they can step in when vacancies occur		
<b>TOTAL number of checkmarks recorded in each column</b>		



SLIDE 16

TIME: 5 MINS

SUPPLIES:

HANDOUTS: HANDOUT 1 READINESS ASSESSMENT

## SLIDE 17

### INSTRUCTIONS

**Instructions:** Every group will experience some degree of turnover and this is likely to be the case with SET. Some people will leave the Team due to job changes, family obligations, illness/death, burnout, or a desire to volunteer for some other worthwhile project in the community or region. The question that most groups have to wrestle with is how to have in place a plan for replacing team members as they depart the group. Consider these two possible situations.

Emergency Succession: Occurs when there is a sudden departure of a key leader from an organization or company.

Planned Departure: Happens when a leader of the group has opted to retire or to move to another community, but has provided notice several weeks or months before his/her departure.

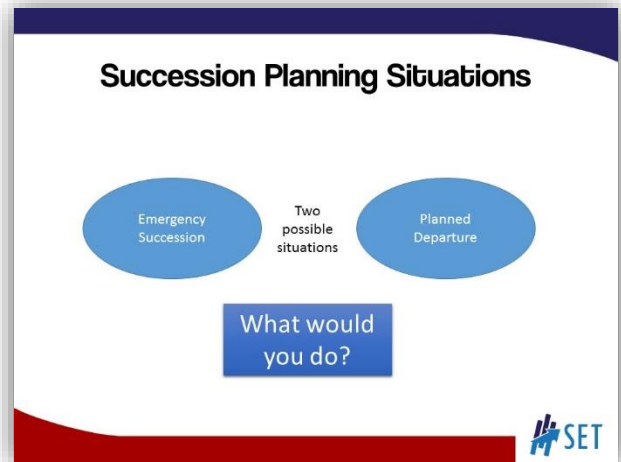
What would you do? What are the unique challenges of these two situations?

[Allow time for discussion]

Two approaches are discussed in the following slides to give some ideas to the team. These include:

Talent Development: Involves developing a pipeline of talent that can be tapped to join a group when a member of the team departs.

Replacement Planning: A short-term solution for handling turnover of members.



SLIDE 17

TIME: 10 MINS

SUPPLIES:

HANDOUTS:

## SLIDE 18

### INSTRUCTIONS

#### Goal: Describe the important characteristics of a Talent Development strategy

Every group should take time to focus on internal talent development. The individuals serving on the SET Core Team should identify members of the Planning Team who have the interest and inclination to take on the added responsibilities associated with the Core Team in the future. In order for their transition into a leadership role on the SET Core Team to run smoothly, it is vital for these individuals be mentored over an extended period of time by existing members of the Core Team and by the Regional Coach.

Beyond efforts to build their “bench strength” internally, the SET team should keep an eye on other individuals in the region who may be excellent candidates to join the SET team. One possible strategy is to recruit a good mix of talented people to take part in an existing community leadership development program and once the training is completed, invite interested participants to join and support the activities of the SET Planning Team. Expanding the pipeline of talent by drawing on graduates of a local community leadership development program to serve as new members of the SET Regional Team makes sense. It is important to develop a line of succession for all your key SET positions & train/mentor those being targeted.

### Talent Development

Forward thinking strategy designed to:

- Develop a leadership readiness pipeline
- Build internal talent
- Promote the group sustainability
- Build “bench strength!”




SLIDE 18

TIME: 5 MINS

SUPPLIES:

HANDOUTS:

## SLIDE 19

## INSTRUCTIONS

**Goal: Discuss the More Common Approach for Handling Turnover -- Replacement Planning**

Most organizations fail to put a succession plan in place. More often than not, they rely on a strategy called replacement planning as a way to respond to openings that may occur on their management team or advisory boards, the slide outlines the typical process involved in securing new members to join the group.

In the case of SET, if the group wishes to embrace this succession planning strategy, the process can be strengthened by having a solid job description. This allows the person being recruited for the Regional Planning Team to have a good understanding of the responsibilities that he/she is expected to carry out.


In addition, the SET Planning Team should try to identify individuals with the knowledge and skills that are needed by the team as it works on developing and implementing a sound regional plan.

Finally, it is important to mentor new members so that they can get “up to speed” on what the SET Planning Team has accomplished to date and what important work remains to be done. Mentoring is a valuable mechanism for accelerating the ability of new members to become positive contributing members to the work of the SET team.

### Replacement Planning

<ul style="list-style-type: none"> <li>• Represents the most common approach</li> <li>• Usually involves asking for volunteers to fill a vacancy</li> <li>• Personal one-on-one appeal is common as well</li> </ul>	<p>Improve the process by:</p> <ul style="list-style-type: none"> <li>• Having a job description</li> <li>• Examining roster of members and proactively target viable candidates</li> <li>• Providing mentoring opportunities</li> </ul>
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HELP



SLIDE 19

TIME: 5 MINS

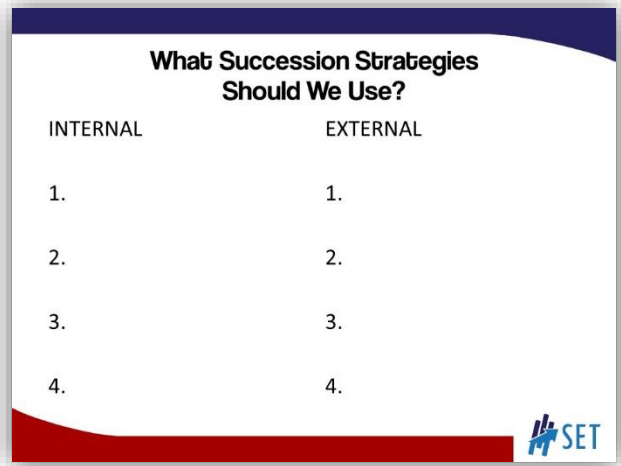
SUPPLIES:

HANDOUTS:

**SLIDE 20**  
**INSTRUCTIONS**

**Goal: Involve the SET Planning Team in a Succession Planning Activity**

In this activity, Planning Team members are invited to consider the mix of internal and external succession strategies that should be considered. Have the group divide into two groups. Have one group give attention to the Talent Development Option and a second group generate internal/external strategies associated with Replacement Planning. Give them about 15-20 minutes to generate ideas. Then, have each group report their recommendations. As a team, discuss the recommendations offered by the two groups and then decide on the specific succession strategies your team will implement over the next 6-12 months.



SLIDE 20

TIME: 10 MINS

SUPPLIES:

HANDOUTS: HANDOUT 2 WHAT  
SUCCESSION STRATEGIES SHOULD WE USE?

**SLIDE 21**  
**INSTRUCTIONS**

**Goal: Provide a synopsis of the important components for keeping the energy of the SET regional team going**



SLIDE 21

TIME: 5 MINS

SUPPLIES:

HANDOUTS:

## SLIDE 22

## INSTRUCTIONS

**Goal: Outline the ingredients for keeping momentum of the SET Planning Team going strong**

The final concern expressed by past SET participants is the challenge of keeping the work of the SET Planning Team on the path of success. When you synthesize the information outlined in this module, you begin to realize that the ingredients for sustaining the work of the SET Regional Planning Team are clearly noted. In particular, seven components are showcased on the slide.

- Establish a Core Team to handle the logistics
- Provide Planning and Core Team members with a list of their roles and responsibilities;
- Inform the Planning Team of the expectations of a Regional Coach;
- Recruit a diversity of people to serve on the Planning Team;
- Invite residents to weigh in on the plans generated by the SET Planning Team;
- Keep key local/regional leaders informed of the Planning Team's activities;
- Develop a sound succession plan for recruiting talented people to serve on the Planning Team.

**Ingredients for Maintaining an Effective SET Team**

- Establish a Core Team to handle the logistics
- Provide Team members with a list of roles and responsibilities
- Understand the expectations of a Regional Coach
- Recruit a diversity of people to serve on the Planning Team
- Invite residents to weigh in on the plans generated
- Keep key local/regional leaders informed of SET activities;
- Develop a sound succession plan

**ingredients**  
(some assembly required)



SLIDE 22

TIME: 5 MINS

SUPPLIES:

HANDOUTS:



SLIDE 23

INSTRUCTIONS

**Goal:** Bring attention to the importance of having good transition plans for the SET Planning Team

**Instructions:** Briefly discuss this quote. How do you see this playing out in this region?



SLIDE 23

TIME: 5 MINS

SUPPLIES:

HANDOUTS:

## References

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- Wolford, Tim. 2008. Building leaderful organizations: Succession planning for nonprofits. The Annie E. Casey Foundation Executive Training Monograph Series, Volume 5.

**SLIDE 24**  
**INSTRUCTIONS**

Insert Contact information and State Logos



SLIDE 24

TIME:

SUPPLIES:

HANDOUTS: