EXIT RIGHT®

Succession Planning Licensing Overview
Kevlar for Nonprofit Leadership









"Four Seasons" by Linda Fairburn represents the cycle of regeneration found in healthy organizations.

Licensing Agreements allow your nonprofit agency to deliver succession planning training to your membership at prices they can afford.

Is an Exit Right® Licensing Agreement right for you? Take the test!

1. You are an agency, association, consultancy, cooperative, council, federation or other entity serving for benefit or nonprofit constituencies
2. You are mandated to provide relevant training and development for your membership in the most cost efficient method
3. You have human resources professionals, adult educators or trainers already on your staff
4. Your membership has identified a need to plan for:
   - Retirements within the next three years
   - Short and long term temporary absences for critical staff positions, especially for its president, chief executive officer or executive director
   - Permanent succession of senior staff leaders.

Why reinvent the wheel?

Our clients asked us for cost effective, sustainable succession training so they could provide continuing organization development for their members. They already had the membership, communication channels, mandate, relationship, community, trust, staff and the ability to apply for and receive funding to meet this pressing need. Here's our solution.

Licensing Agreements are available for:

1. Exit Right ® Getting Started with Integrated Succession Planning for Nonprofit Corporations
2. Exit Right ® Emergency Leadership Planning for EDs of Nonprofit Corporations
3. Exit Right ® Succession Planning for Staff Positions

Licensing agreements include:

- Train the Trainer
- Facilitator's Guides
- Participants' Workbooks
- PowerPoint Presentation
- Self assessments
- Speakers Notes
- Brochures and Associated Artwork

Contact Make Things Happen for more details about licensing agreements for the Exit Right® suite of succession training programs.

Make Things Happen Limited
519.766.1400
www.makethingshappen.net

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1. Exit Right ® Getting Started with Integrated Succession Planning for Nonprofit Corporations Presentation or Workshop

Licensing includes:

- PowerPoint Presentation Exit Right® Getting Started with Integrated Succession Planning for Nonprofit Corporations
- 15 point self assessment
- Speakers Notes
- Brochures and promotional material

This power point presentation is perfect for groups of 3 130, AGMs, conferences, multi agency events, boards of directors' meetings and professional development situations. The power point slides double as a marketing tool and can be played on a continuous loop at promotional events.

This presentation can be delivered in 20 90 minutes and will:

- Begin the dialogue about the inevitability of leadership transition and its impact on your organization
- Provide a framework to understand the terms and processes
- Explain succession planning as it relates to foundations, nonprofit and charitable corporations
- Review the common barriers to succession planning faced by boards and their executive directors — and provide tips on how to meet them head on
- Introduce you to a four step process that will lead you to succession readiness
- Include a 15 point self assessment

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2. Exit Right ® Emergency Leadership Planning for EDs of Nonprofit Corporations

Licensing includes:

- Train the Trainer
- Facilitator's Guide
- PowerPoint Presentation
- Brochures and Associated Artwork

This half day workshop is suitable for groups 3 60 (10 30 organizations) and is designed for foundations, nonprofit and charitable corporations and their boards of directors, chief operating officers, chief executive officers, executive directors and succession planning committees. We recommended that 2 3 persons per agency attend, preferably the CEO/ED and two members of the board of directors.

This is a hands on workshop where participants receive a turn key toolkit to put together an action plan for a short term succession plan and get the resources needed to develop policies and procedures for temporary long term and permanent situations. Participants will continue to complete the plan after the workshop that will take from 12 16 additional hours. This interactive workshop will help organizations to:

- Identify barriers that prevent your organization from moving forward
- Obtain commitment to the succession planning process from your board of directors
- Provide an overview of the integrated succession planning process
- Assign authorities and responsibilities to stabilize daily operations
- Outline communication strategies
- Assess the resources you need
- Plan for future succession activities
- Reap the benefits of succession readiness

Agencies are asked to bring their organization chart and current ED job/role descriptions to the workshop.

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3. Exit Right ® Succession Planning for Staff Positions

Licensing includes:

- Train the Trainer
- Facilitator's Guide
- PowerPoint Presentation
- Brochures and Associated Artwork

This half day workshop is designed to develop temporary short term replacement plans for critical staff positions. These absences can be unplanned and caused by an accident, injury or illness or planned such as parental or family leaves. In smaller organizations almost every staff position is critical while in larger organizations this may include supervisory and managerial levels. The approval for this plan is the responsibility of the executive director or the human resources manager, if there is one. Participants will continue to complete the plan after the workshop that will take from 4 6 additional hours.

This workshop also is suitable for boards of directors preparing for the departure of their CEO/ED.

Participants in the workshop prepare a temporary short term replacement plan for their position that includes:

- Reviewing current job, roles, responsibilities and stakeholder expectations
- Identifying future job requirements
- Defining the responsibilities of and create a short term emergency job description
- Identifying a candidate list and assess their developmental needs
- Creating an training and development plan, and
- Applying an employee readiness map

This workshop is suitable for groups of one or two organizations, in house facilitation and small organizations. Attendance in this workshop may require performance management preparation on the part of the organization prior to the workshop. Attendees are asked to bring their organization chart and their current job/role descriptions to the workshop.

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