



Are You Prepared? **Executive Leadership Transitions** **and the Board's Role**

An In-Person Workshop for Executive and Board Teams



GOVERNANCE INTENSIVE

April 19, 2024 • 10 a.m. – 3 p.m. • Minneapolis

The Governance Intensive is sponsored by Compeer Financial

PURPOSE:

Older adult services organizations are experiencing an increase in the number and frequency of executive transitions, and no longer can they expect to enjoy decades-long tenures of top leaders. Whether due to retirement, job change, or unanticipated departure, healthy organizations must have a well-thought-out transition plan for key executive positions to ensure the smooth operation and uninterrupted services to their customers and staff. As a nonprofit organization, the governing board plays a unique and important role in creating and executing leadership transition and succession plans.

The Governance Intensive, now in its 11th year, returns to in-person for maximum impact and insightful conversations. This workshop includes expanded content, actionable tools and resources, and the benefit of sharing and learning from executives and board members from other nonprofit, mission-focused organizations.

It is designed to be attended by executive and board teams to gain valuable information and insight for both perspectives.

SCHEDULE OF EVENTS

9:30 a.m.	Registration and Continental Breakfast
10 a.m.	Examination of Leadership Transitions Assessing the Organization's Readiness for Leadership Transitions
Noon	Networking Lunch
1 p.m.	Approaches, Tools, and Resources for Creating Transition Plans The Board's Unique Role in Leadership Transitions
2 p.m.	Member Experience Panel
3 p.m.	Adjourn

LEARNING OBJECTIVES

- Understand the board's role in executive transitions and the distinctions between board and management roles and responsibilities.
- Discuss the specific roles to cover in your transition plan and the scenarios that lead to executive departure.
- Explore the factors that impact your organization's transition readiness.
- Recognize common missteps and assumptions that derail effective transition plans.
- Discover assessment strategies to gauge your current level of transition readiness.
- Learn about transition planning approaches and tools your organization can use to start or continue this work.
- Develop a set of next steps for your organization to take in creating a transition readiness plan.
- Hear from two member organizations about their work in developing transition plans for their executive team members.

SUGGESTED AUDIENCE

This workshop is designed for Senior Executives, Human Resource Officers, and Board Member Teams of Nonprofit Organizations.

PRESENTER:

Alex Clark, Founder, Coach and Consultant, Turnlane, Minneapolis

MEMBER PANEL:

Angela Brown, Chief Human Resources Officer; Paul Fox, Board Member; and Cindy Morris, Board Member, Cassia, Edina; and Barb Klick, CEO; and Jerry Rudick, Board Member, Sholom, St. Louis Park

ALEX CLARK

Alex Clark is an executive coach and organizational consultant with 15 years of experience partnering with nonprofit, for-profit, and government organizations.

Alex founded Turnlane, a leadership and executive consultancy firm in Minneapolis, in 2017. Turnlane specializes in leadership transitions, strategy development, and executive coaching for a spectrum of organizations, including health care and older adult services.

He holds a bachelor's degree in psychology from the University of Wisconsin, Madison, a master's degree in organizational development and HR management from the Carlson School of Management at the University of Minnesota, and a master's degree in healthcare administration from the School of Public Health at the University of Minnesota.



CEUs

This workshop has been designed to meet the CEU approval criteria for the Minnesota Board of Executives for Long Term Services and Supports (MN-BELTS). Participants may also request a general certificate of attendance.

**Eligible
for 4.0 clock
hours**

HANDOUTS

Participants will receive links to electronic handouts before the conference and are encouraged to print them in advance or download to view on a laptop or tablet.

REGISTRATION INFORMATION AND FEES

LeadingAge Minnesota Members/Board Members – \$135 per person
Prospective Members/Board Members – \$189 per person

Registration fee includes refreshment breaks and a light lunch.

REGISTER HERE

ACCOMMODATIONS

LeadingAge Minnesota has negotiated an association rate of \$149 per room per night at Delta Hotel, 1330 Industrial Blvd NE, Minneapolis, MN 55413. The association rate of \$149 is for a standard room.

BOOK YOUR HOTEL

CUT-OFF/CANCELLATION

Registration cut-off date/cancellation deadline is April 12, 2024. Cancellations must be made in writing and are subject to a \$25 processing fee. No-shows will be billed the full registration fee. LeadingAge Minnesota reserves the right to cancel this workshop.

FOR FURTHER INFORMATION

Registration:

Olivia Scott at oscott@leadingagemn.org or 651.603.3559

Program content:

Barbara Landeen at blandeen@leadingagemn.org

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The Governance Intensive is sponsored by

