



JA BENEFITS

Strategy Driven. Future Focused.

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The Succession Saga:
HR and Executive Strategies for Non-Profit Sustainability

Presented by:



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Agenda

- **Current State of Employment Landscape**
- **Retention Strategies**
- **Career Paths & Developing Strengths**
- **Preparing Your Leaders**

How Did We Get Here?

- **Environmental Drivers**
 - U.S. Unemployment Rate
 - Labor Force Participation Rate
 - Jobs Added/New Jobs
- **Environmental Awareness**
 - Birth Rates
 - Life Expectancy
 - Total Job Growth
- **What do we do about it?**
 - Understand Your Environment
 - Strategically Differentiate



Environmental Drivers

U.S. Unemployment Rate

3.7%

Unemployment has fallen to its lowest level since 1969

We surpassed full employment in May of 2016 and stayed below that level since.

Environmental Drivers

U.S. LFPR

62.5%

The **Labor Force Participation Rate** has remained consistent between 62.1% and 62.4% for decades. In December it was **62.5%**, averaging 62.6% in 2023.

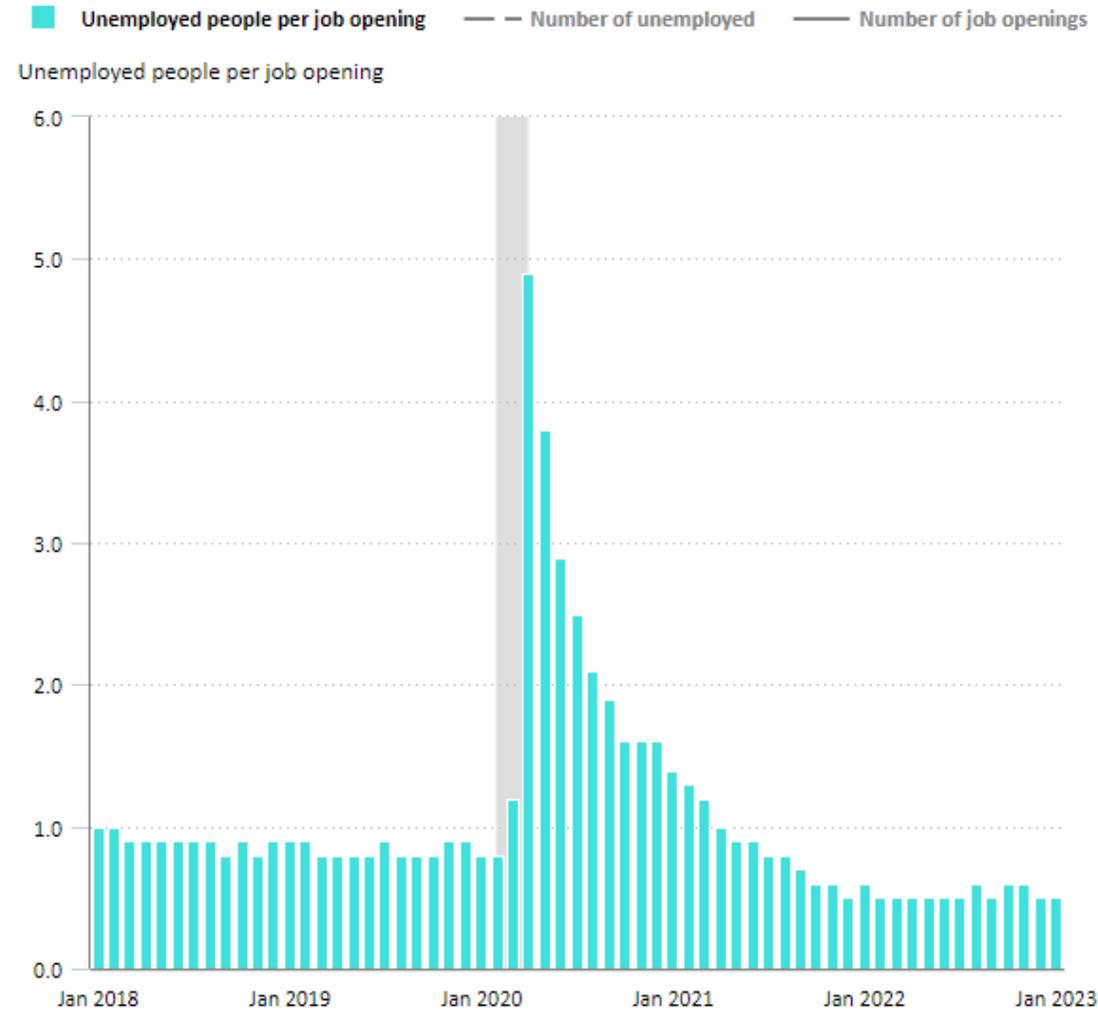
There is not a group of people sitting on the sidelines waiting to come back to work.

Environmental Drivers

U.S. Jobs Added

216,000

Number of unemployed people per job opening, seasonally adjusted



Click legend items to change data display. Hover over chart to view data.
Shaded area represents a recession as determined by the National Bureau of Economic Research.
Source: U.S. Bureau of Labor Statistics.

Environmental Awareness

What does your future,
as an employer, look like?

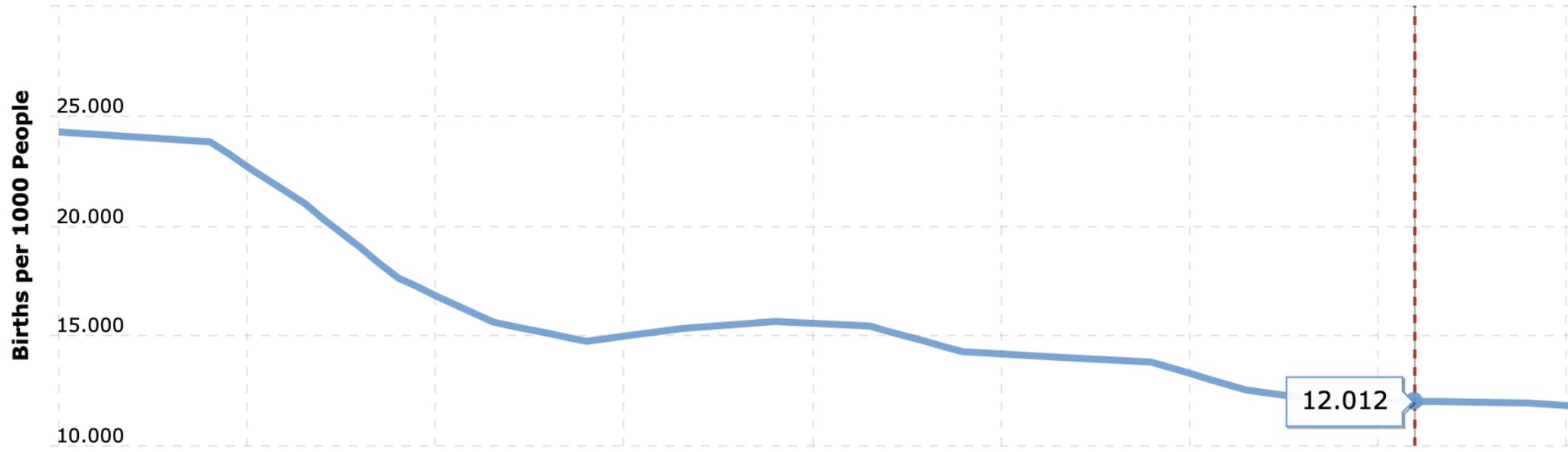
Birth Rates in the U.S.

From: To:

Zoom:

Historical

Current



COVERED Covers the Gap Coverage & Need Coverage Gap Coverage Shortfall Coverage Deficiency Coverage Shortage Coverage Deficit Coverage Gap Coverage Shortfall Coverage Deficiency Coverage Shortage Coverage Deficit

Life Expectancy in the U.S.

From: To:

Zoom:

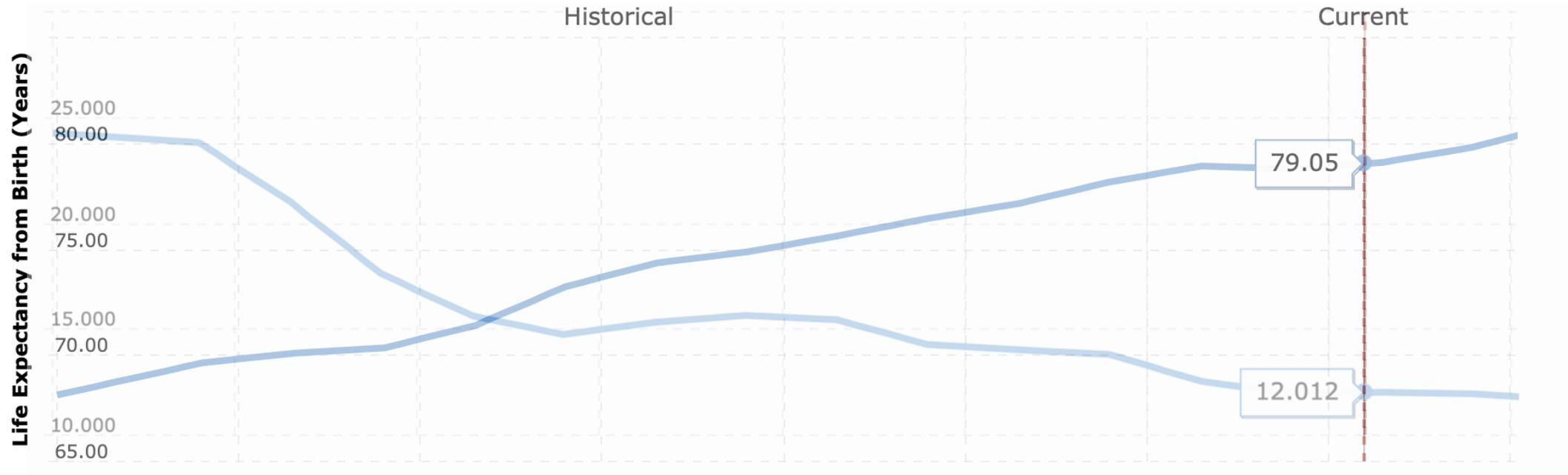
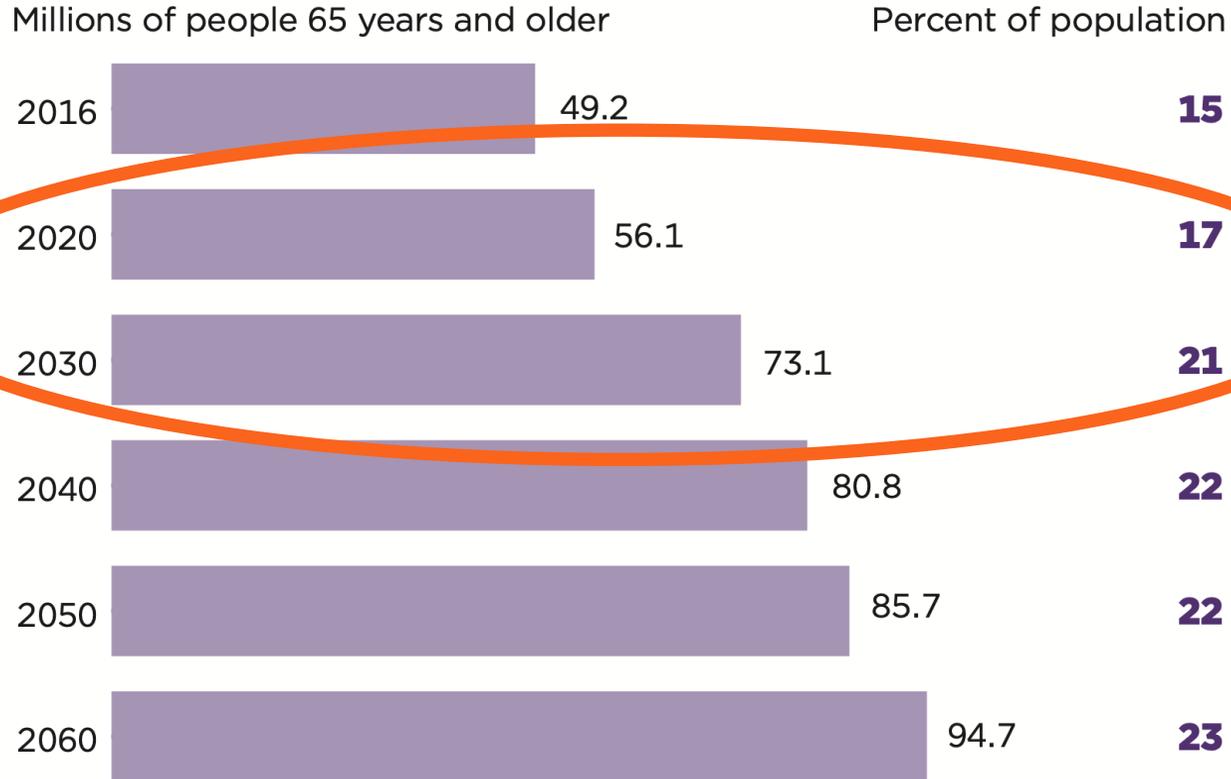


Figure 1.

Projections of the Older Adult Population: 2020 to 2060

By 2060, nearly one in four Americans is projected to be an older adult.



Source: U.S. Census Bureau, 2017 National Population Projections.

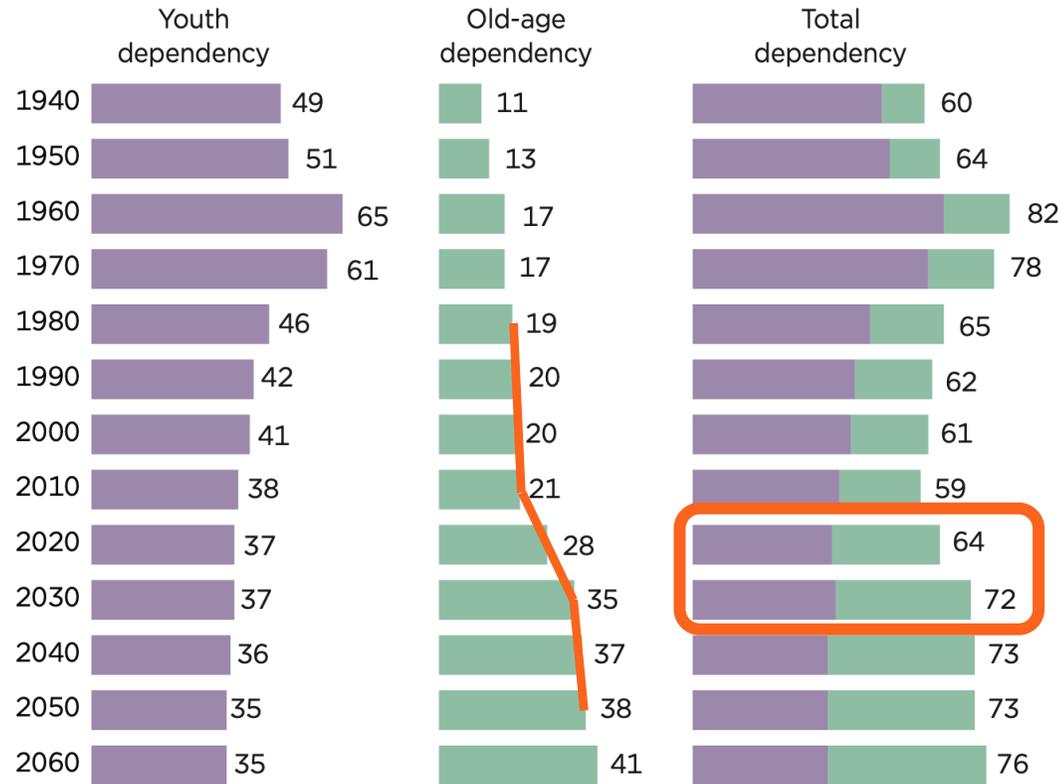
From 2020 to 2030 the population of people aged 65 or older is projected to increase by 17 million people.

That is a 30% increase.

The largest single increase in history.

Dependency Ratios for the Population: 1940 to 2010, Projected Ratios 2020 to 2060

By 2020, there are projected to be two dependents for every three working-age adults.



Note: Dependency ratios are a measure of potential burden on the working-age population.

Youth dependency ratio = (population under 18 / population aged 18 to 64) * 100.

Old age dependency ratio = (population aged 65 and older / population aged 18 to 64) * 100.

Source: U.S. Census Bureau, 2017 National Population Projections, 1940-2012 Population Estimates.

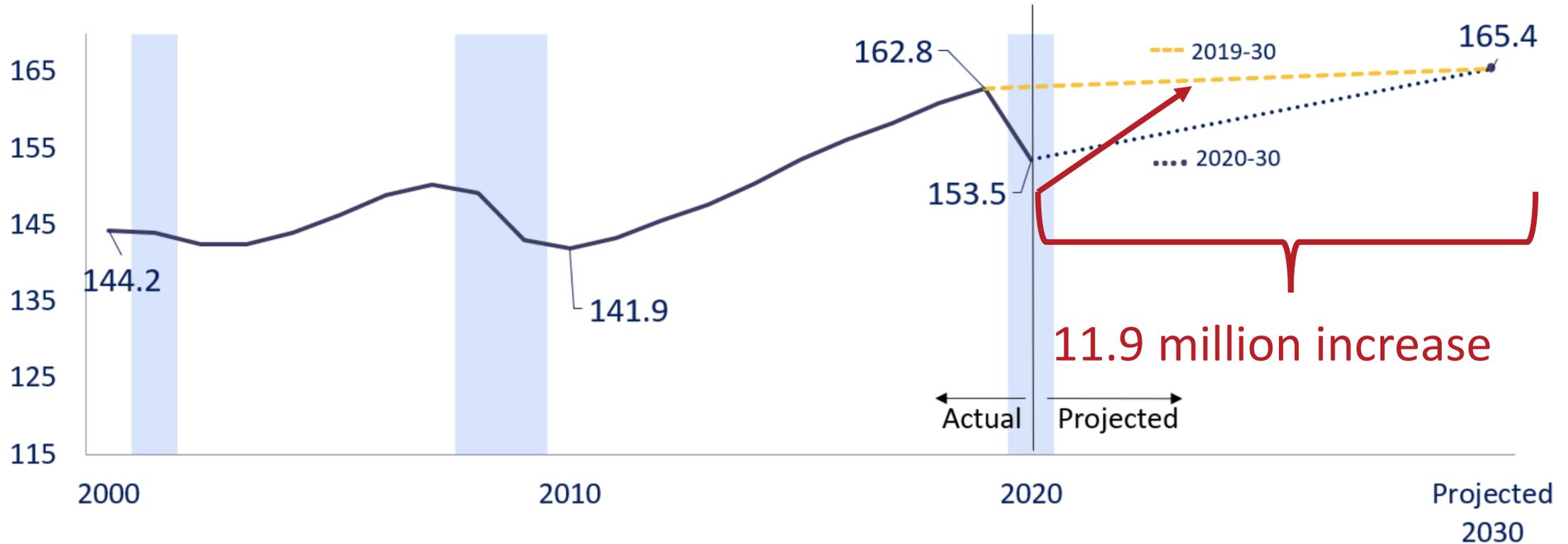
Overall dependency has risen but more significant is the dramatic rise in old-age dependency.

Old-age dependency requires more services and workers to support than youth dependency.

Total Job Growth 2000 to 2020 and Projected Growth 2020 to 2030

All jobs, in millions

□ Recession



From 2020 to 2030 projected job growth will be 11.9 million new jobs. During that same period the total projected population growth of people 18-64 will only be 3.7 million.

This means we will increase jobs more than 3 times faster than we will add people to fill those jobs and we already have 10 open jobs for every 5 available workers.

Long-term problem with no easy answers!

3X

A silhouette of a person pushing a large, dark grey ball up a dark grey hill. The person is on the left side of the hill, leaning forward and pushing the ball. The background is a solid light blue color.

The next decade and beyond is set to be a challenging time for employers. They must differentiate themselves from others in their space.

Most are likely aware of this challenge but have yet to realize the extent of the problem or developed a plan to deal with it.



Retention Strategies

- **Benefits/Compensation**
- **Culture**
- **Employer Value Proposition**
- **Increased Flexibility**
- **In-House Opportunities to Learn & Develop**





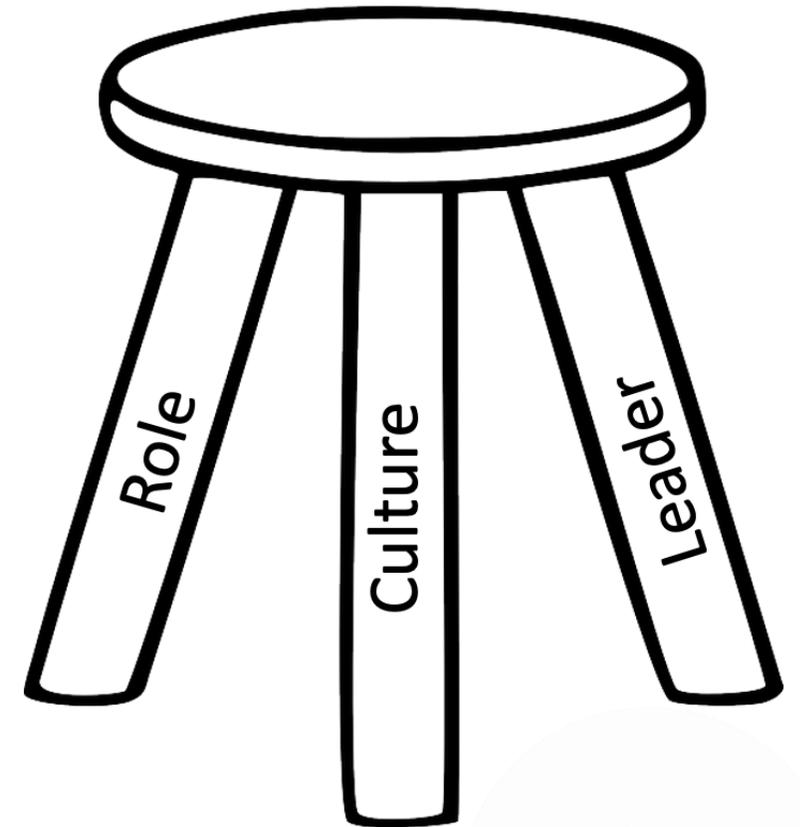
We focus on igniting **Passion** in three areas where the human dynamic intersects with organizational goals.

What: Get people into a **Role** they can be passionate about fulfilling.

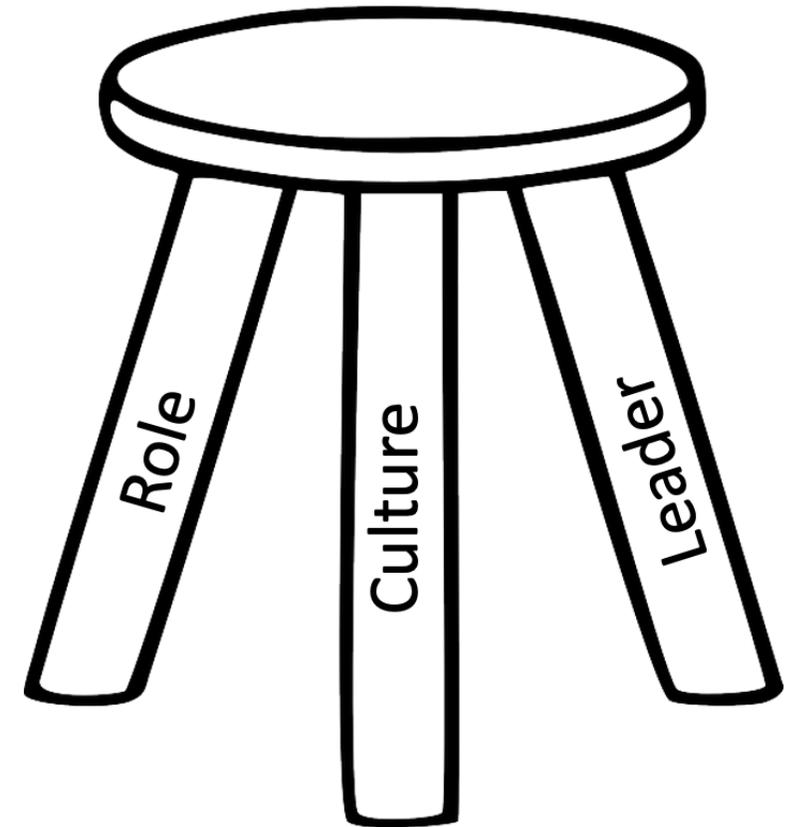
Where: Create a **Culture** people can be passionate about being vested in.

Who: Be the **Leader** people can be passionate about following.

ROLE – CULTURE – LEADER



What: Get people into a **Role** they can be passionate about fulfilling.



Get people into a **Role**
they can be passionate about fulfilling.



- ✓ Knowledge
- ✓ Skills
- ✓ Experience



- ✓ Values
- ✓ Character
- ✓ Passions



- ✓ Behavioral
- ✓ Cognitive
- ✓ Talents

Person to Job Fit



✓ Constantly evolving and changing



✓ Somewhat stable



✓ Remains consistent

Person to Job Fit

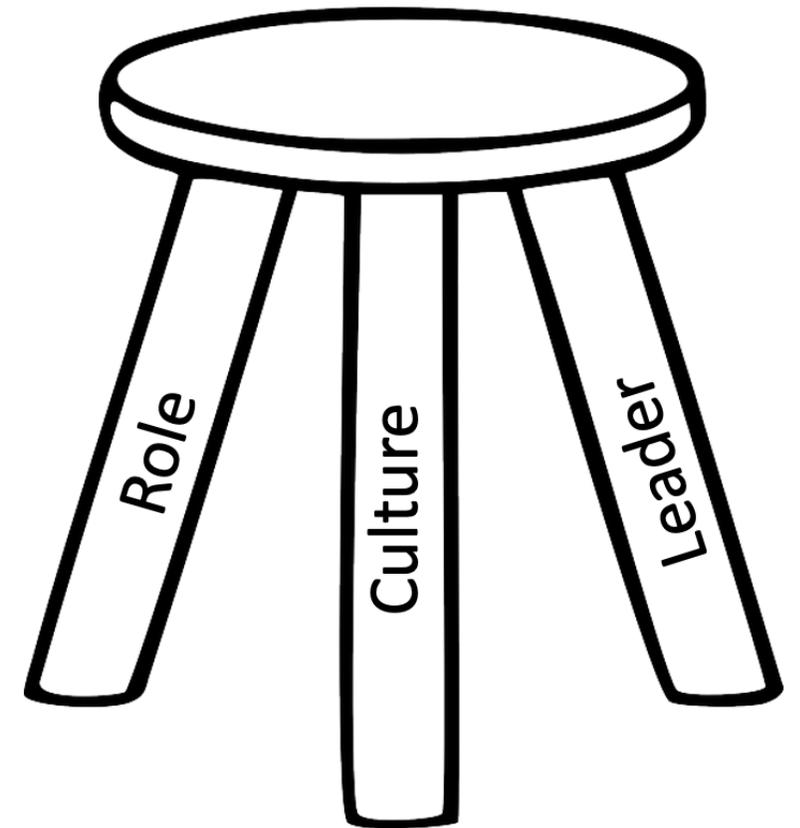


Why we hire them



Predominately why they fail, leave, or are fired

Where: Create a **Culture** people can be passionate about being vested in.

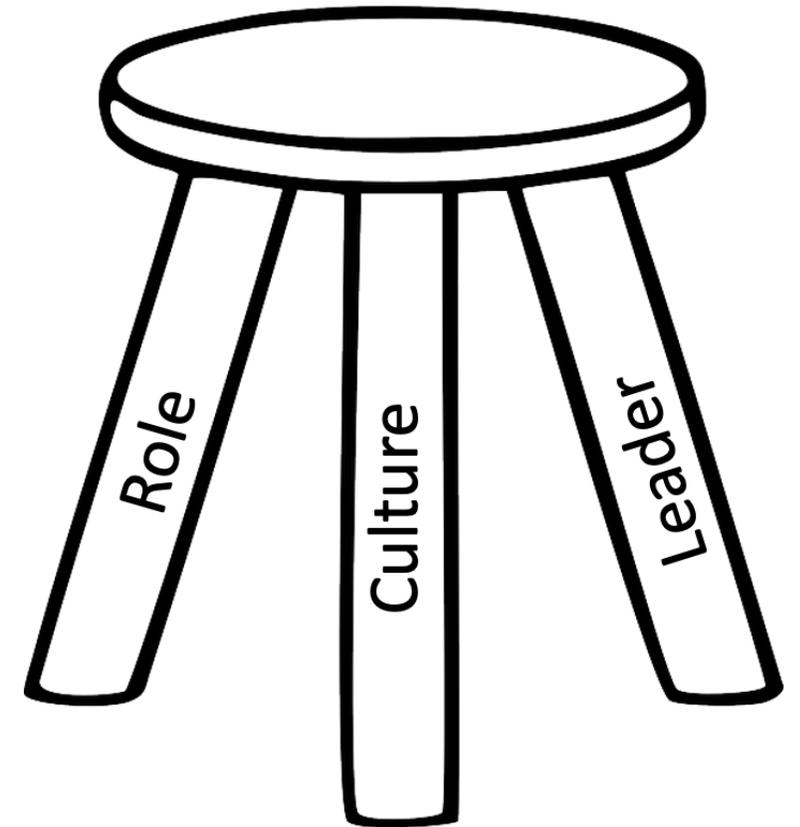


An intentional culture is always better than the one that happens to you

A branded intentional culture is **MEMORABLE**



Who: Be the **Leader**
people can be
passionate about
following.

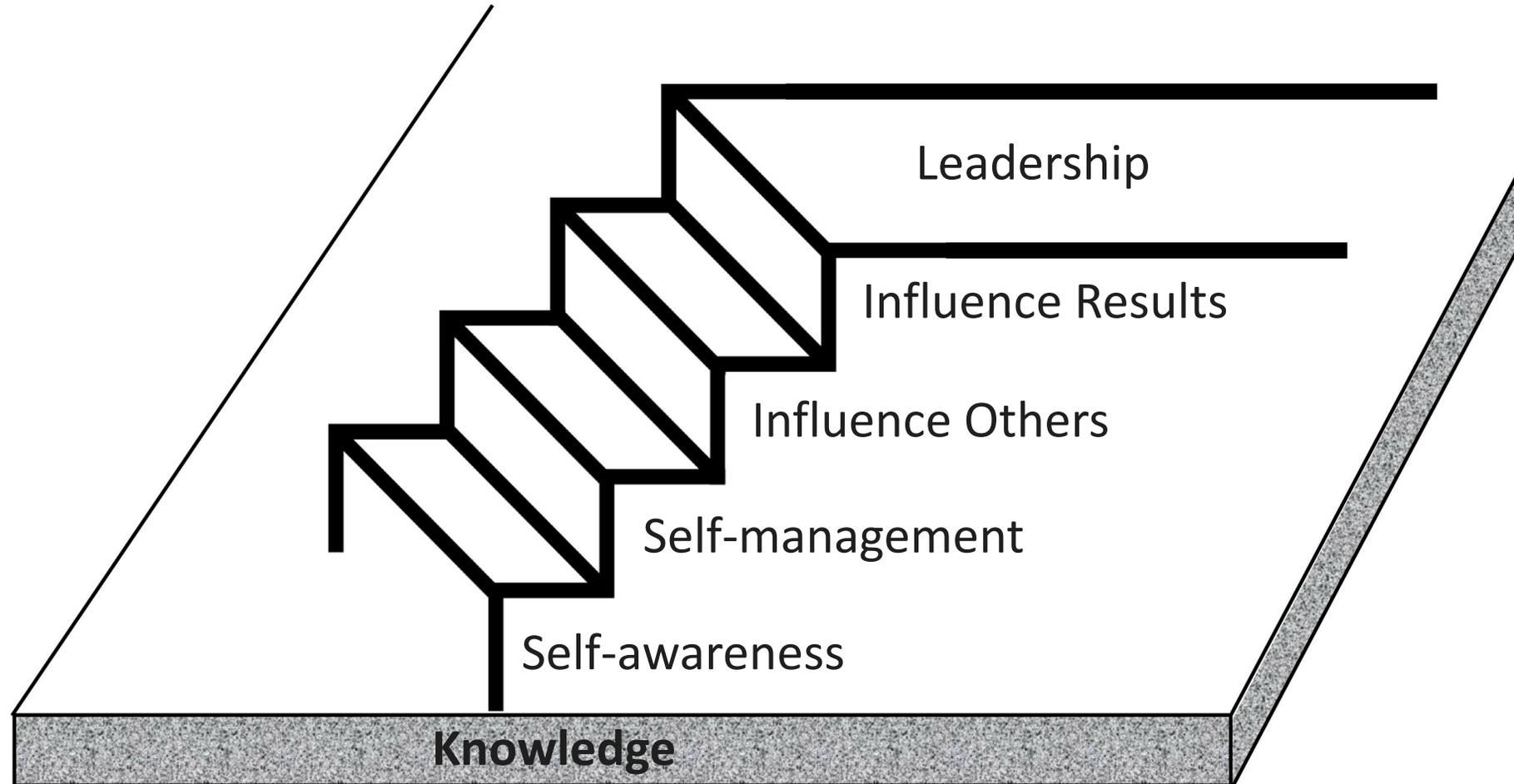


LEADERSHIP STAIRCASE

Path to Achieving Business Results

Before you can lead others,
you must first lead yourself.

The path to achieving
business results/key
objectives and the path to
leadership are the same
path.



Four Stages of Competence

Confident

Apprehensive

Comfortable

Assured

Unconscious
Incompetence

Conscious
Incompetence

Conscious
Competence

Unconscious
Competence

Not learning
or growing
and not proficient

Learning
and growing and
not proficient

Learning
and growing
and proficient

Not learning
or growing
and proficient

* Based on the model by Broadwell, Martin M. (20 February 1969). ["Teaching for learning \(XVI\)"](#)



Leadership Brand

Leadership attributes that create your brand

1. **What you do** - Actions and behaviors
2. **What you know** – Knowledge, skills, and experience
3. **Who you are** – Beliefs, character, and values



Leadership Brand

HEAD

Provide clear purpose, direction, strategy



HEART

Understand, work with and develop others



GUTS

Do the right thing based on clear values

*Oliver Wyman Leadership



Growth Characteristics

1. They have an intense level of curiosity
2. They seek out and engage in meaningful feedback
3. They take action based upon the feedback they receive
4. They are willing to ask for help
5. They find ways to engage with their peers, employees, leaders, and customers/clients daily
6. They are teachers, share stories, and develop others

Leadership Path

Committing to growing the best leadership talent.

Do you have a culture that encourages people to develop outside their current role?

Do you seek out candidates from other areas to fill key roles?

Have you created learning teams/groups that bring together high potentials from across programs to learn and grow together?

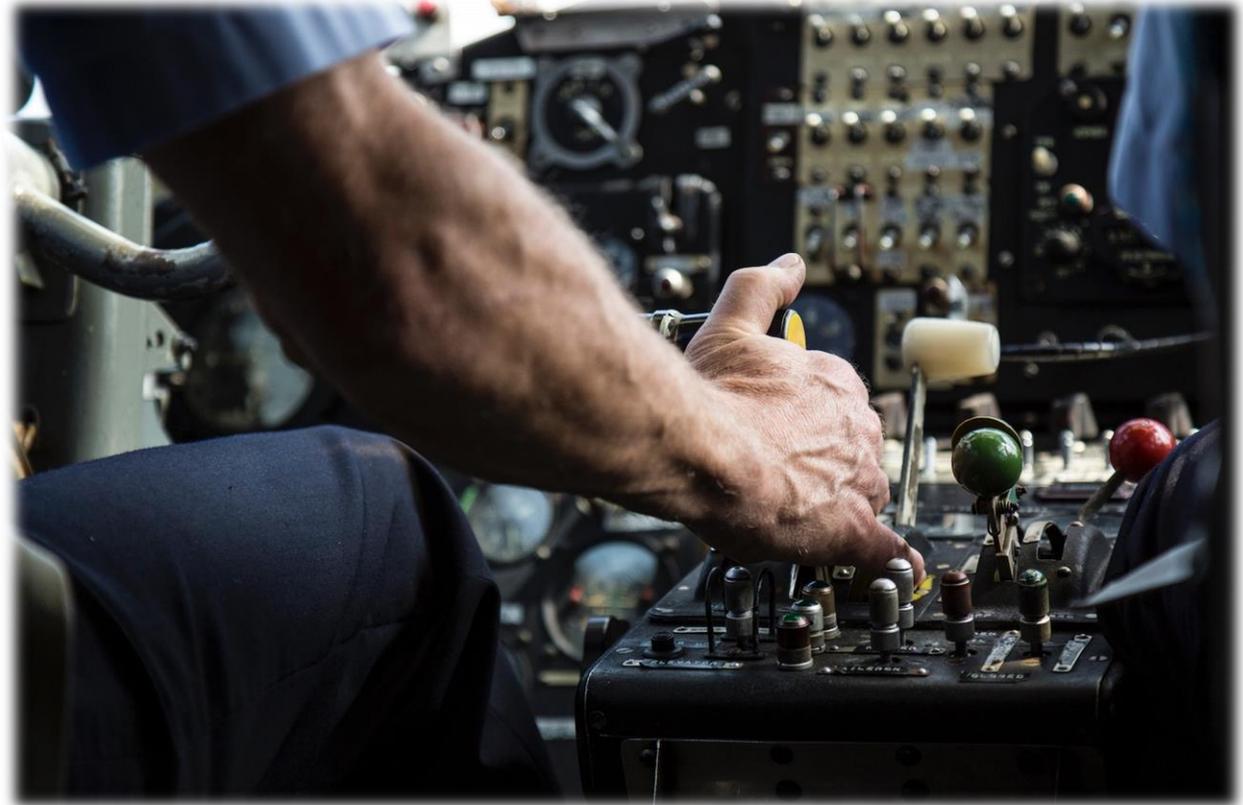
Will strong individuals, who fail to pay attention to broad organizational priorities and/or adhere to cultural requirements, continue to advance?

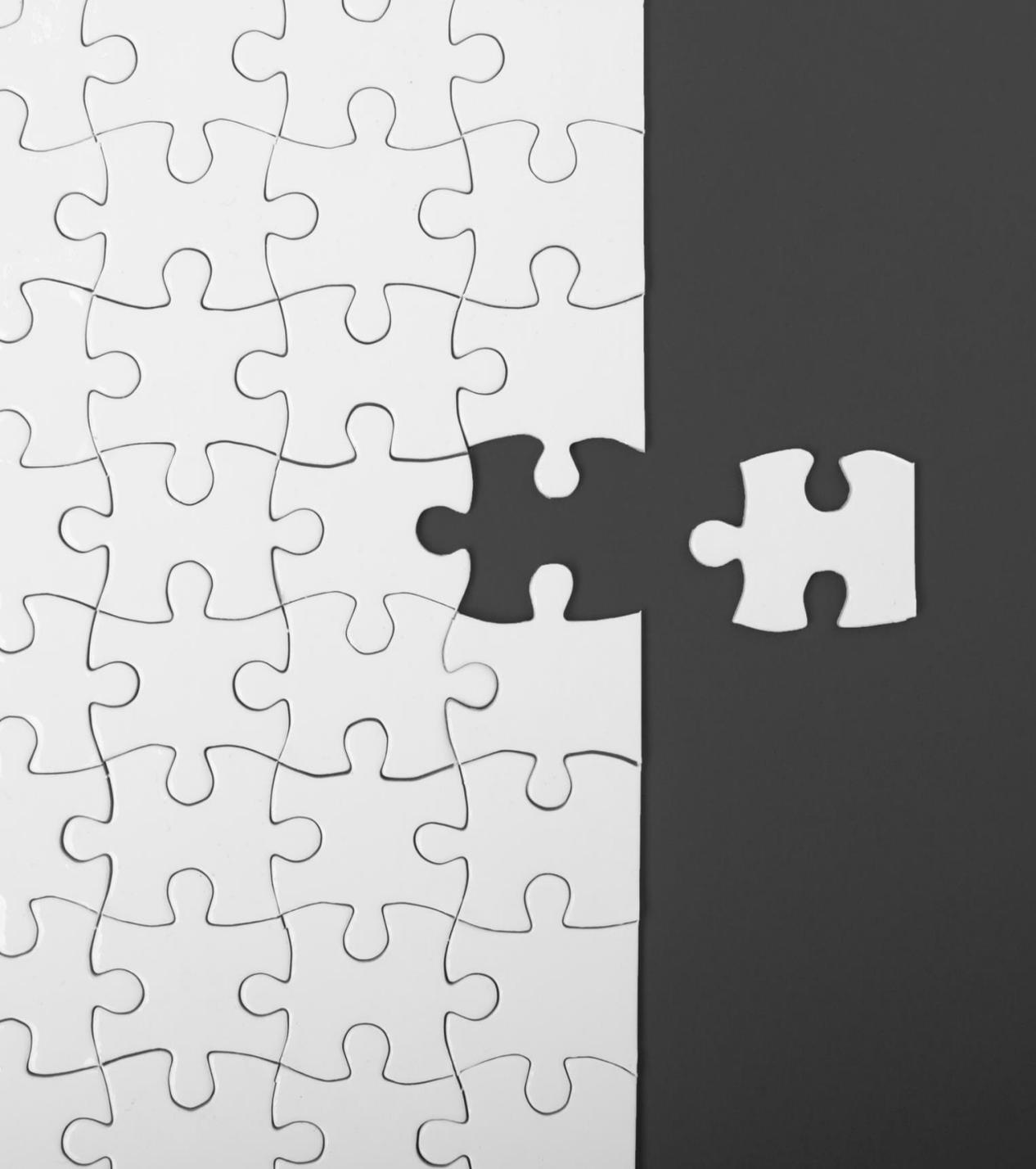


Engagement Levers

Direct Causal Relationship On Engagement

- ✓ Job Fit
- ✓ Relationship with Manager
- ✓ Connection to Mission & Values
- ✓ Trust in Leadership
- ✓ Intentional Culture
- ✓ Investment in Growth & Development





Managing Performance in Organizations

- Job fit – does the role give energy or drain?
- How do you understand an individual's intrinsic motivators
- Leadership – building self awareness and influencing others
- Engagement Levers: Job Fit, Relationship with Manager, Investment in Growth and Development



THANK YOU!

Questions?



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