

Creating a Succession Plan in your Organization

Questions to ask

1. Which best describes your current board?
 - a. All positions filled
 - b. All key positions filled
 - c. Few “openings”
2. Which best describes the make-up of your current board?
 - a. ≥ 50% are serving 1st or 2nd term
 - b. ≥ 50% have served more than 2 term
 - c. ≥ 75% have served more than 2 terms
3. Which best describes the make-up of your current board?
 - a. Pre Boomers
 - b. Baby Boomers
 - c. Mostly Boomers with 1 or 2 Gen X
 - d. Mix of generations
4. Which best describes your current leadership succession plan?
 - a. Fully functioning (& we have the people to prove it!)
 - b. It's on paper
 - c. Catch-as-catch-can
5. What's your pain point?

How to start

1. Answer the above questions
2. Identify needs
3. Review by-laws, standing rules for guidelines
 - a. Is the vice-president position a stepping stone to president
 - b. Is there a president-elect position
 - c. What are stepping-stones to leadership positions – such as activity chair, newsletter editor, journey coordinator, etc?
4. Develop plan to educate members on plan and positions– use available resources
 - a. Newsletter articles
 - b. Board meetings
 - i. Are they open and accessible
 - ii. Are members asked to attend
 - c. General meetings
 - i. Spend a few minutes discussing plan and why it is important
5. Plan a board retreat to help all board members understand their roles and responsibilities
6. Appoint strong nominating committee
7. Assess all members skills, knowledge and ability – determine ways to use and develop them
8. Ensure every board member has a back up who can take over in an emergency, e.g. access to computer files, etc.
9. Reward and acknowledge board members

Some Points to Ponder

- The first responsibility of a leader is to develop a person to replace them. The leader should identify four prospects. Identify four because, on average, one will refuse, one will disappoint, one will move, and one will accept.
- NOT ALL VOLUNTEERS ARE ALIKE
- Generations? Younger generations believe more strongly in the importance of volunteering!
- Why members begin volunteering
 - Meaningful opportunity
 - Doesn't cost me
 - Have the right skills
 - Short-term
 - Accessible assignment location
- Why members don't volunteer
 - Never asked personally
 - Lack of info about opportunities
 - Not meaningful
 - Lack of short term assignments
 - Lack of follow through
 - It costs me

Engage - Connect - Orient - Monitor - Mentor - Reward - Feedback