

# Succession Planning

**Overview**

**Introducing and  
Maintaining**

**Types**

**Nomination  
Process**

**The Future**

# Introduction



Rachel Kelleher  
*Affiliate Coordinator*

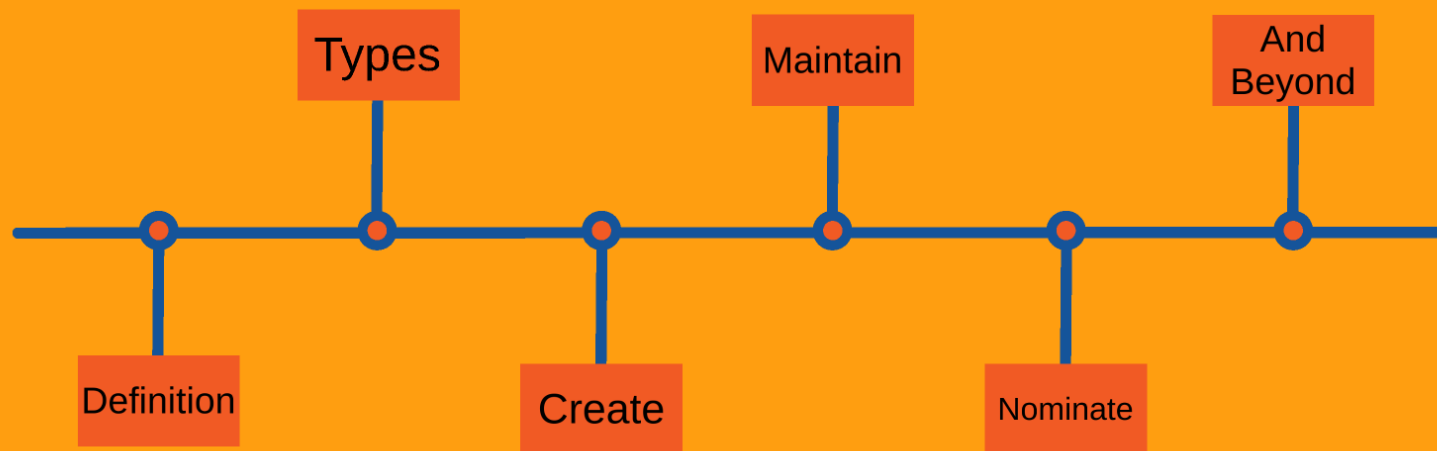


Carrie Kiley, MBA  
*Senior Manager;  
Affiliate Relations*

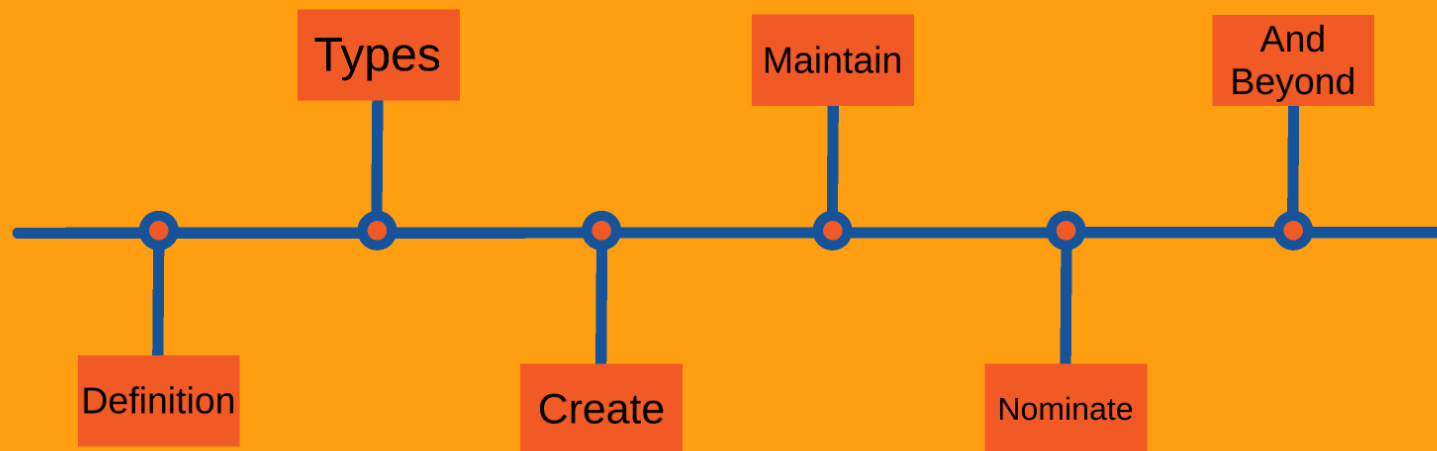
**Agenda**

**Definition**

# AGENDA



# AGENDA





# Introduction



Rachel Kelleher  
*Affiliate Coordinator*



Carrie Kiley, MBA  
*Senior Manager;  
Affiliate Relations*

**Agenda**

**Definition**

# DEFINITION

A process for identifying and developing new leaders who can replace old leaders when they leave.

Succession planning increases the availability of experienced and capable volunteers and staff that are prepared to assume these roles as they become available.



# DEFINITION

A process for identifying and developing new leaders who can replace old leaders when they leave.

Succession planning increases the availability of experienced and capable volunteers and staff that are prepared to assume these roles as they become available.



# Introduction



Rachel Kelleher  
*Affiliate Coordinator*



Carrie Kiley, MBA  
*Senior Manager;  
Affiliate Relations*

**Agenda**

**Definition**

# Succession Planning





# Volunteer and Staff Plans





# Volunteer and Staff Plans



# VOLUNTEERS



- Orientation materials
- Training and best practice materials
- Annual calendar for the position/committee
- Central file storage
- Time with outgoing volunteer

# STAFF

- Ensure volunteer leaders have access to all the files of your ED - everything is stored virtually and not on a personal laptop
- Have ED work to outline a detailed annual calendar of what is done each month with links to relevant files/folders/instructions
- Have regular meetings with your ED and ask details about what they are working on so you are an informed leader and understand the scope of the work



# Succession Planning





## Laying the Groundwork

Establishing a succession plan is a large undertaking that requires everyone's expertise and never ends



**Introducing  
Succession  
Planning**

**Maintaining  
Succession  
Planning**

# How to Introduce Succession Planning



- Create a safe space for open discussion
- Emphasize duty of care and duty of loyalty to the affiliate
- Be reassuring with staff - this can seem threatening to their position
- Present a checklist of items to develop to start discussion
- Create a plan together based on discussion
- Designate a position to coordinate updating plans annually



# How to Introduce Succession Planning



- Create a safe space for open discussion
- Emphasize duty of care and duty of loyalty to the affiliate
- Be reassuring with staff - this can seem threatening to their position
- Present a checklist of items to develop to start discussion
- Create a plan together based on discussion
- Designate a position to coordinate updating plans annually

# Volunteers

- Look at the materials - when you first started what items would have been useful for you starting out? Work to create missing items
- Reassure them this is meant to be helpful, and will not be a complete/final document. Instead it is a starting point that future volunteers will continue to build on. Please do your best and be as complete as possible to help future volunteers feel more empowered in their position.
- Incorporate updating of best practices and training materials into your annual calendar so volunteers know this is an expectation every year

# Staff

- Leverage your regular review period to establish creation of a succession plan as a new job requirement
- Communication should be centered around board responsibility and long term planning
- Explain volunteers are also creating these plans
- Be sure to ask for input and any questions

## Laying the Groundwork

Establishing a succession plan is a large undertaking that requires everyone's expertise and never ends



**Introducing  
Succession  
Planning**

**Maintaining  
Succession  
Planning**