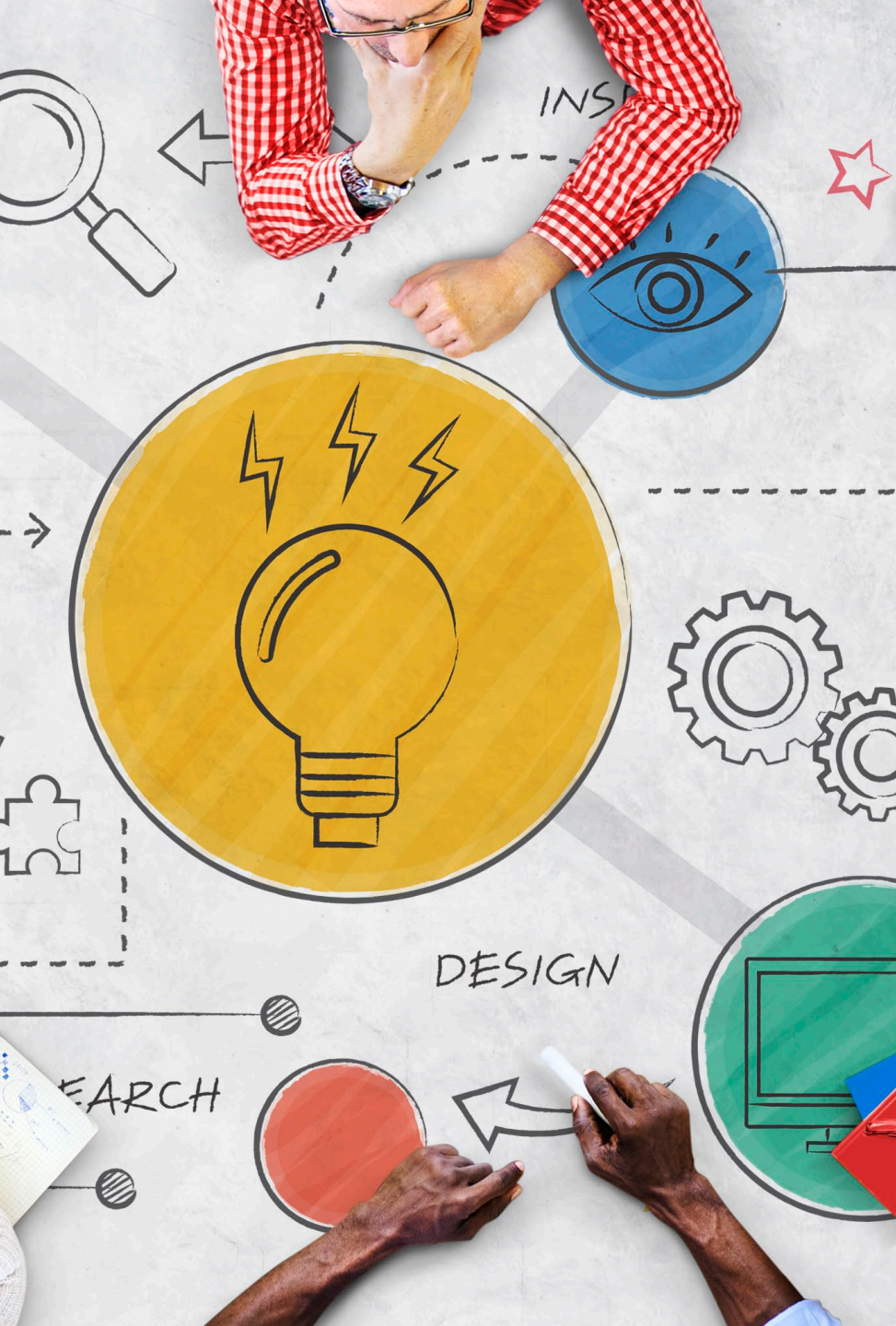


# Succession Planning for Success

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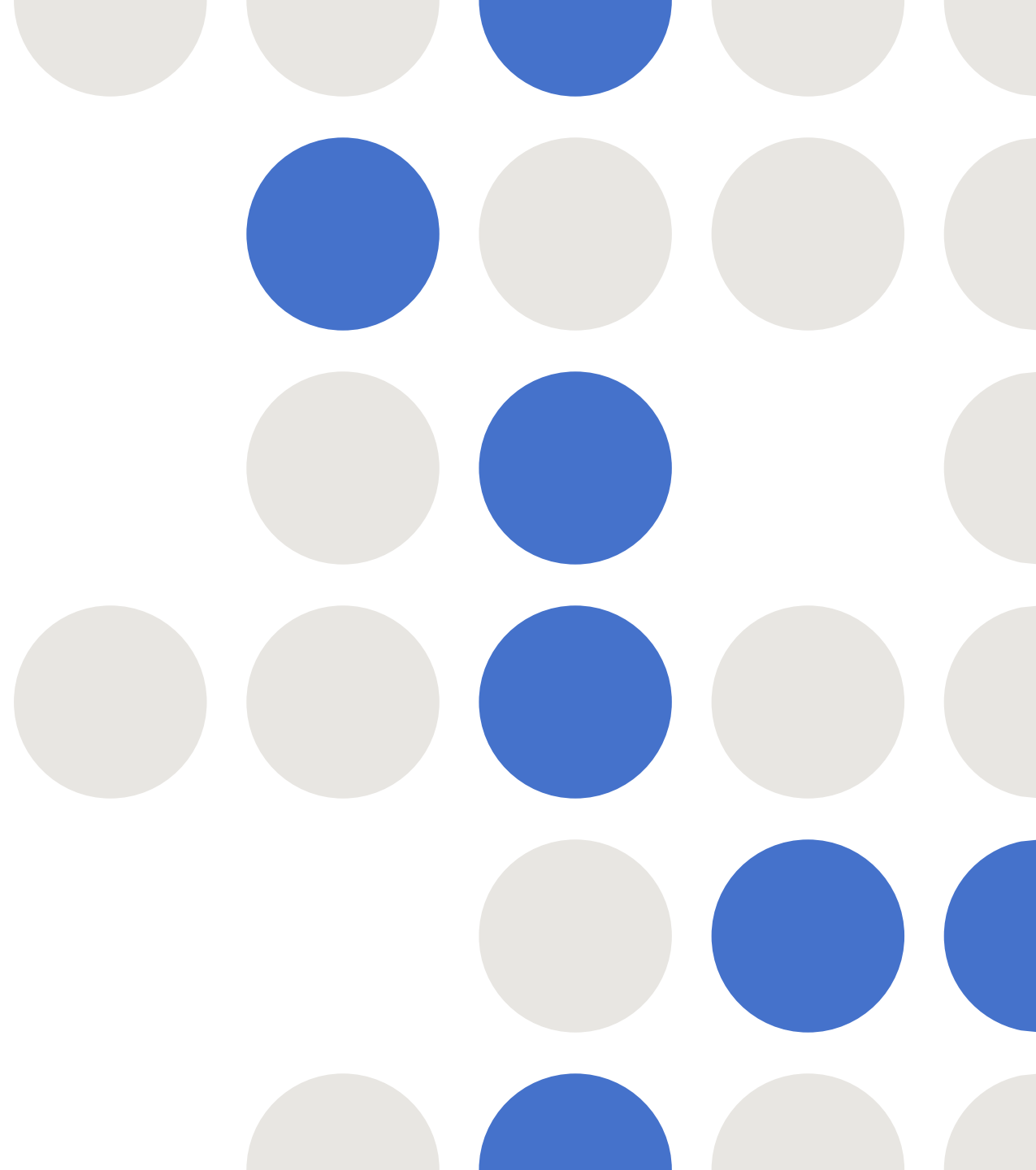


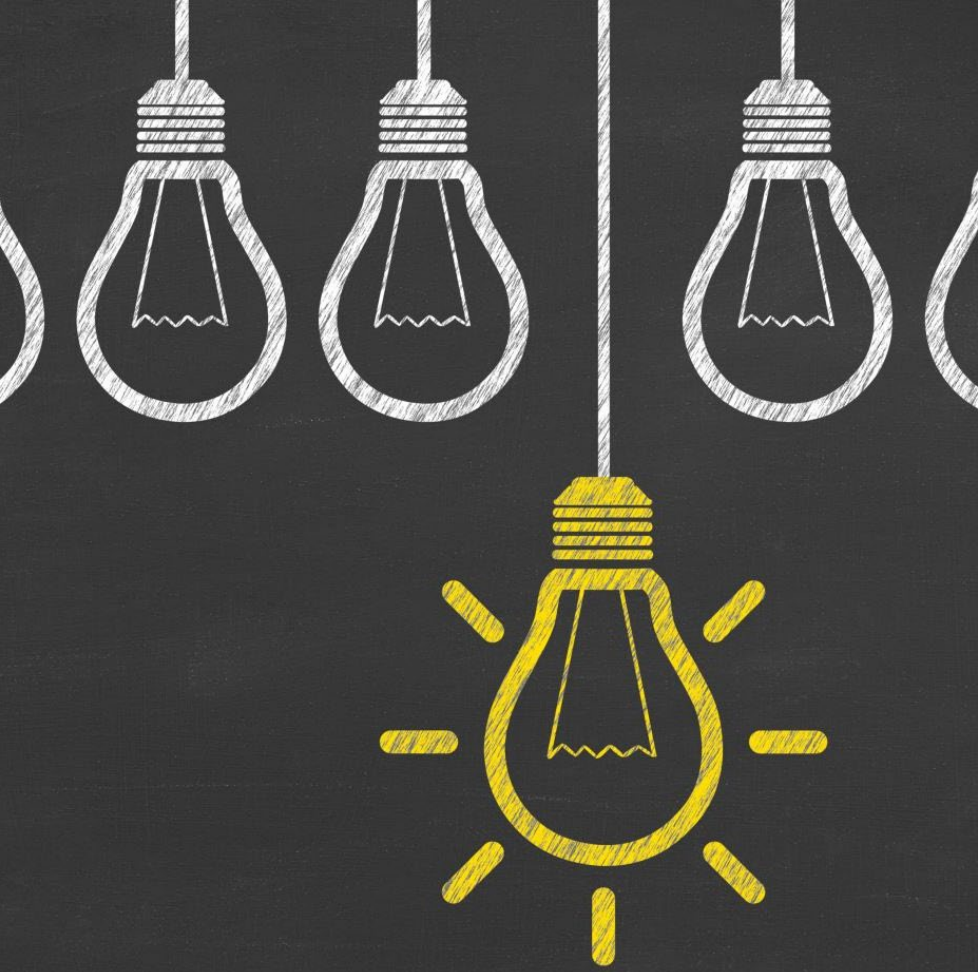
# Definition of Succession Planning

- Succession planning is a process and strategy for replacement planning or passing on leadership roles. It is used to identify and develop new, potential leaders who can move into leadership roles when they become vacant.
-

# Succession Planning

- Why do we need succession planning?
    - Volunteer recruitment and retention
    - Training and orientation
    - Engagement
- 



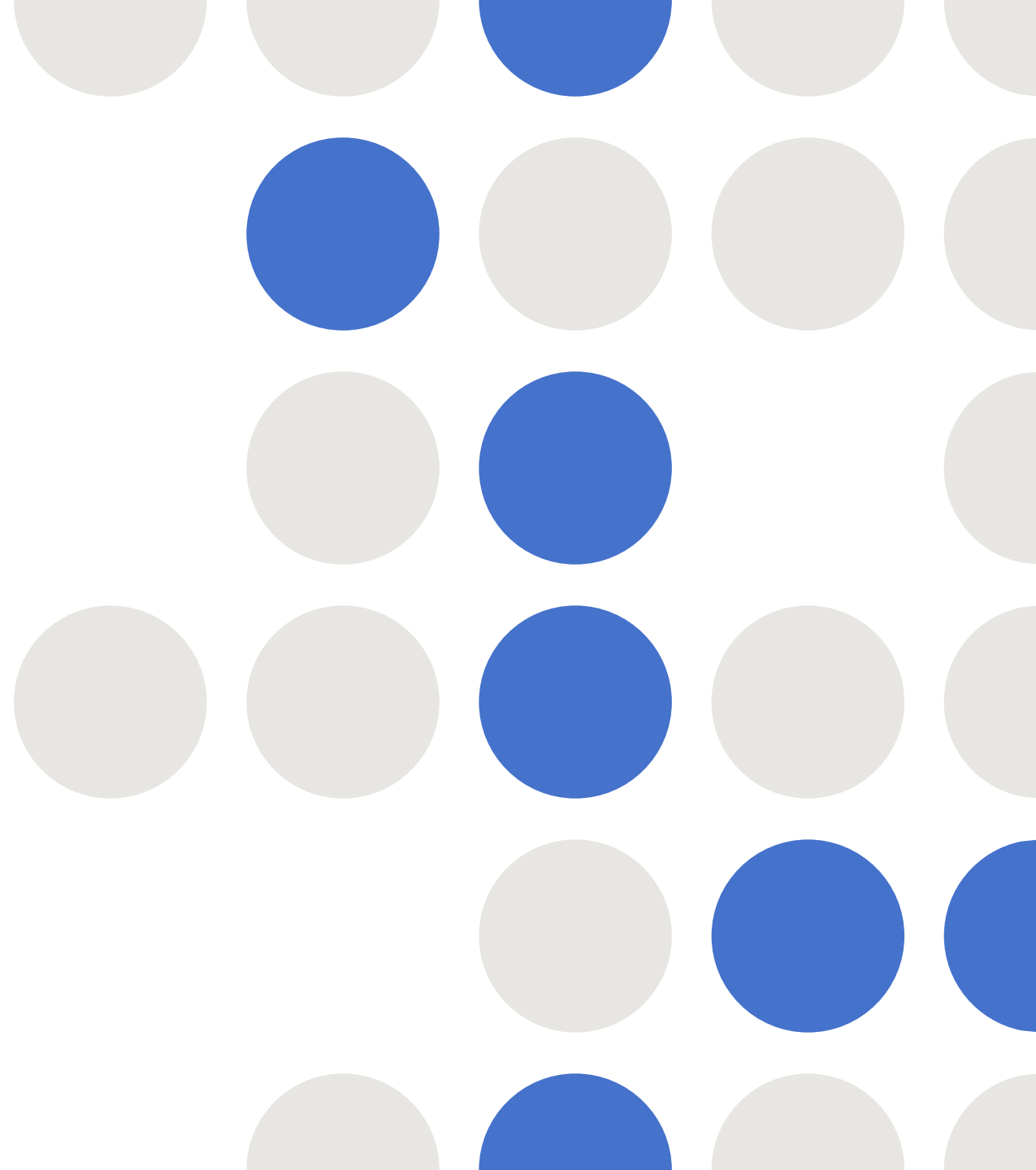


# Volunteers vs. Staff

- What is the role of the volunteer in succession planning?
  - What is the role of staff in succession planning?
  - What resources do volunteers need?
  - What resources do staff need?
-

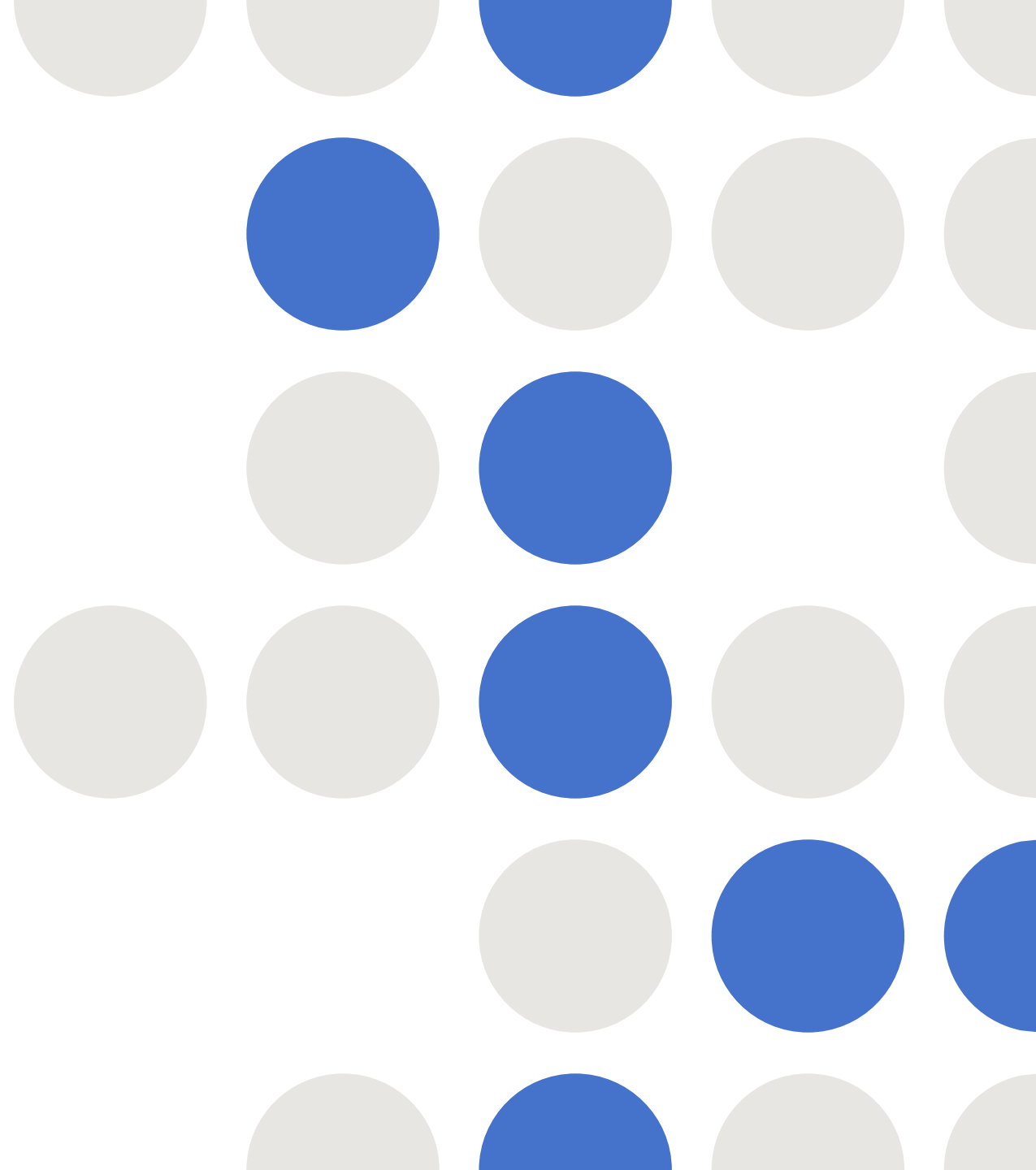
# Volunteers

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



# Staff

- Have ED work to outline a detailed annual calendar with links and relevant files/folders/instructions
  - Have regular meetings with staff to know what they are currently working on and to better understand the scope of work.
  - Ensure volunteers leaders have access to all staff files
    - Everything is stored virtually and not on a personal computer
- 







# Creating Succession Plans

- Lay the groundwork
  - Establishing a succession plan is a large undertaking and requires everyone's expertise
  - Look to past plans for guidance
-



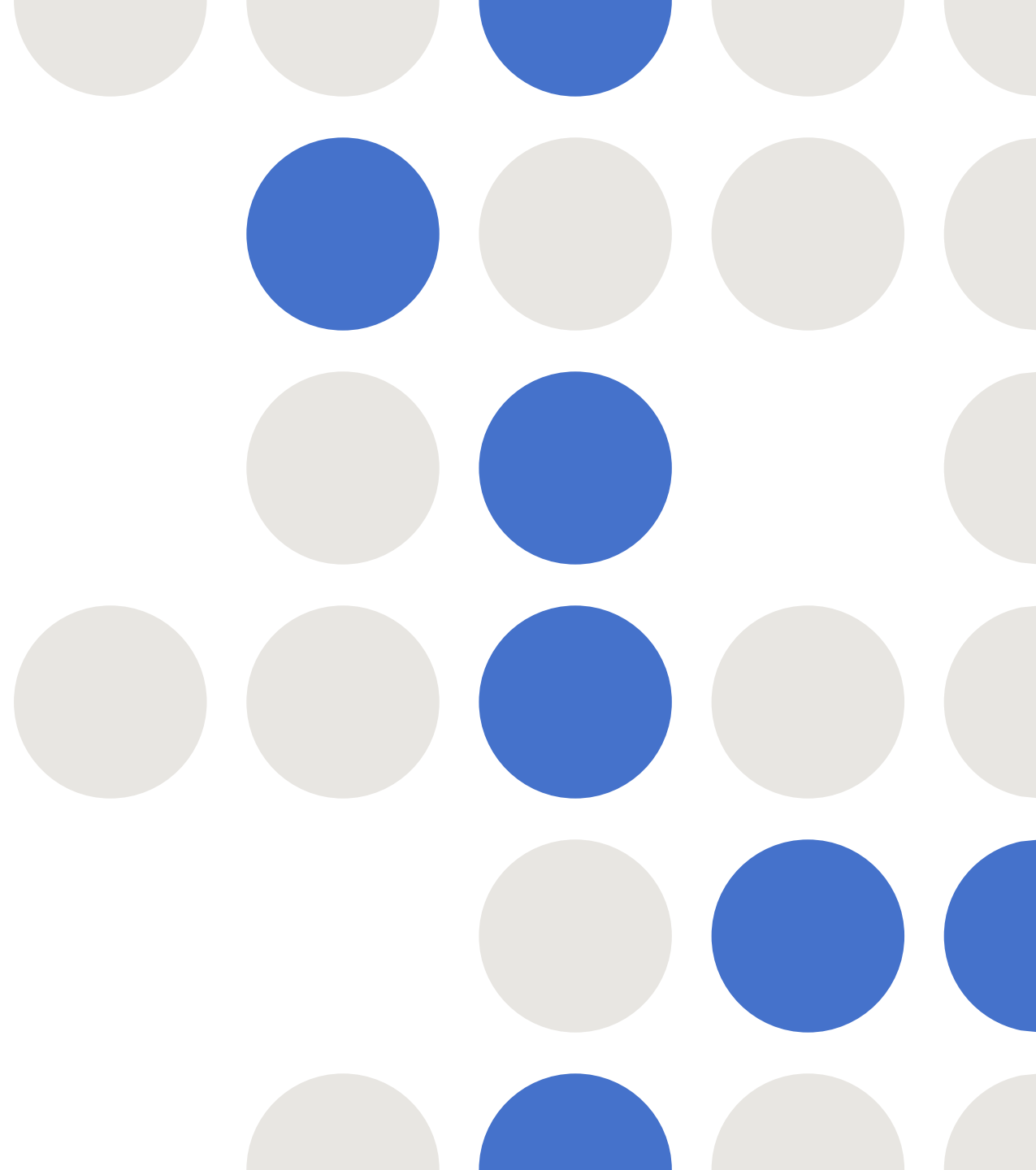
# Introducing Succession Plans

- Create a safe space for open discussion
  - Emphasize duty of care and duty of loyalty to the affiliate
  - Be reassuring to staff
  - Present a checklist of items to help kickstart the conversation
  - Create a plan together
  - Designate who will coordinate updating the plans annually
-



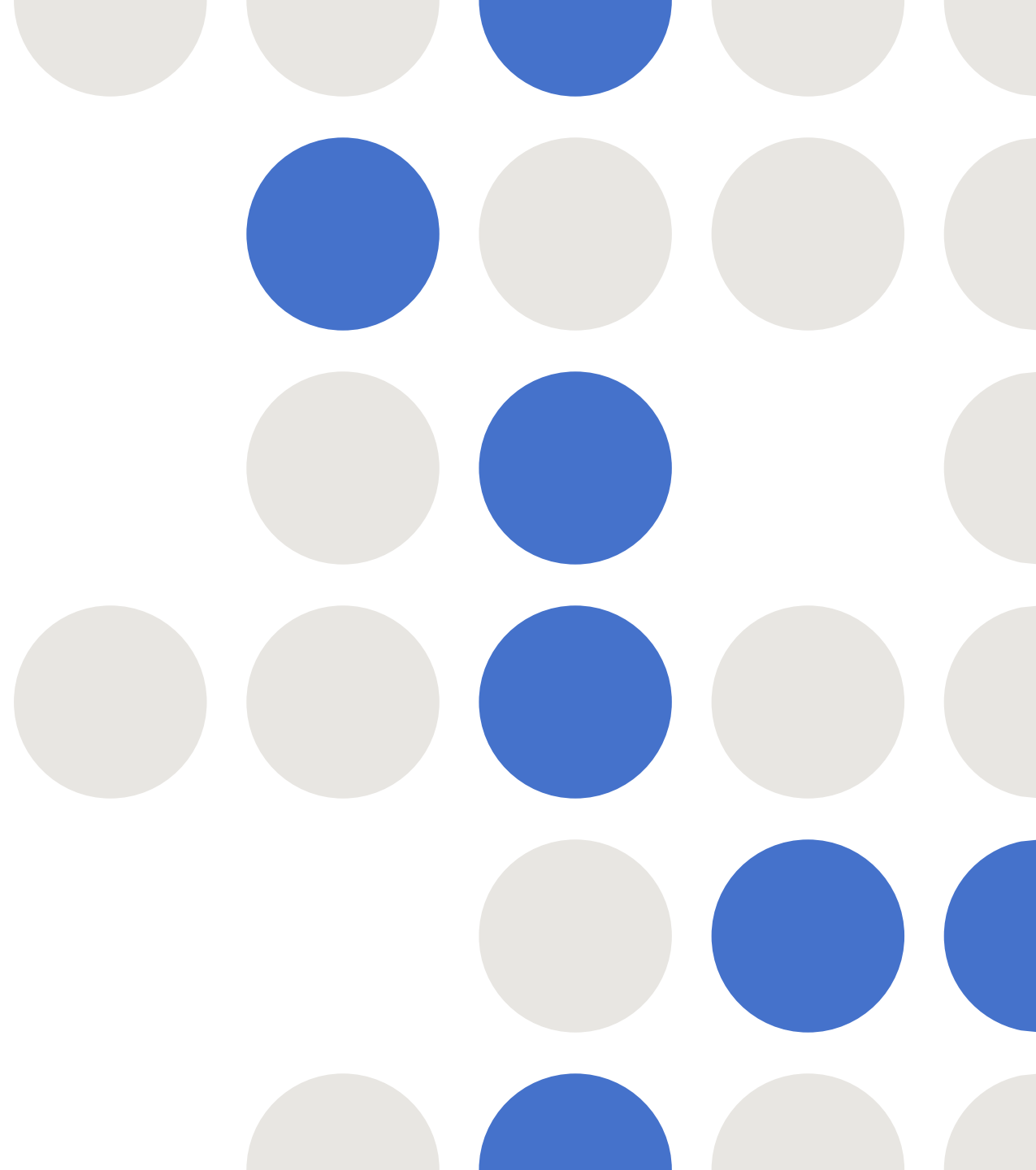
# Volunteers

- Think of what materials would have been helpful when you first started volunteering
  - Reassure others this is meant to be helpful and that this is a living document
  - Consider making updating best practices and training materials part of your annual calendar
  - Set expectations
- 



# Staff

- Communication should be centered around board responsibility and long term planning
  - Explain how volunteers are also working to help create these plans
  - Be sure to ask for input and ask questions
- 





# Maintaining Succession Plans

- Build succession planning into position requirements for volunteers
- Designate a position to lead the process
- Build the review into your annual calendar
- Utilize an evaluation processes





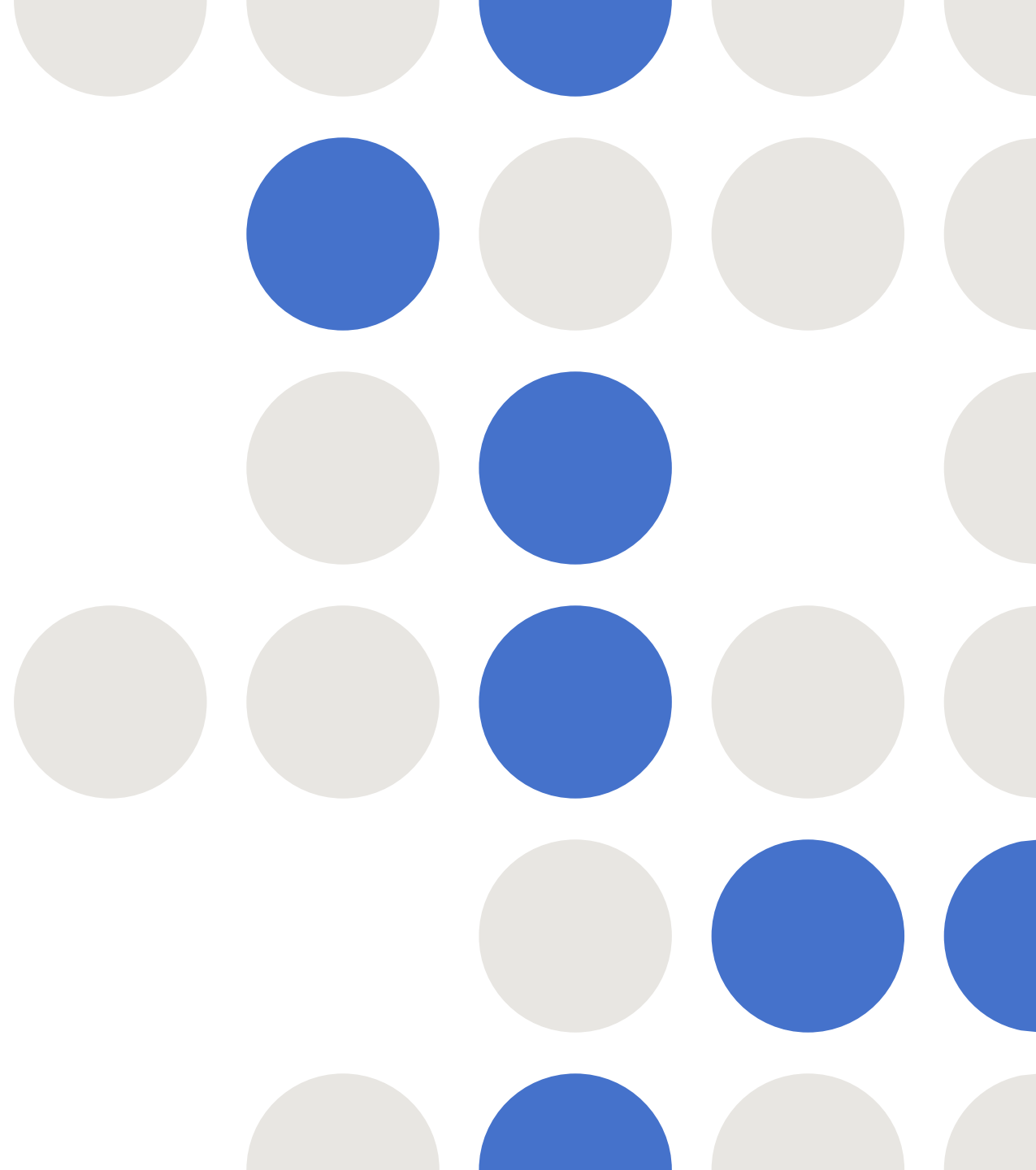


# Nomination Process

- Create a detailed nomination process
  - Make sure your board decides what qualifications you want to focus on
  - Goal is to have a qualified and balanced board
  - Things will not always be easy – don't get discouraged
-

# Laying Groundwork for the Future

- Your succession plans will lay the foundation for future programs/initiatives and allow you to effectively execute your strategic plan
    - Recruit focused volunteers
    - Retain staff who are engaged
    - Help with recruitment of highly qualified and diverse individuals
- 





# Questions?

