Succession Planning Toolkit

Volunteer Leadership Recruitment Committee

# Purpose

To create a succession plan landscape for volunteers that includes a toolkit for chapters on how to better recruit volunteer leadership for their chapters. This toolkit is segmented into three key areas of succession: Recruitment, Development, and Transitions and Training. Volunteer Leadership Succession requires the complete understanding of your individual chapter membership and how each member plays a significant role to the success of that chapter.

# Volunteer Recruitment

Volunteer Recruitment begins from day one of membership. This can even be an entry to become a member. An easy and simple way to recruit volunteers is to just ask them personally! Have a one-to-one conversation with a member and see where they would like to volunteer. Also, make it easy for members to connect with volunteer opportunities. Do not overcomplicate the initial engagement process.

1. Review and identify who is currently volunteering and where they have volunteered/are currently volunteering.
   1. SUGGESTION: Pull Membership list from Global on a quarterly basis and update Succession Plan Tracking document with any new volunteer members and remove any members that either transferred or did not renew.
   2. RESOURCE: ***Succession Planning Worksheet***
   3. RECOMMENDATION: Save the Succession Plan Tracking Document as a new file each quarter to maintain a historical chain to the documentation in the event a former member that previously transferred to a different chapter or cancelled comes back to the chapter.
      1. File Naming Convention:   
         *2022-2023\_MPICHAPTERNAME\_SuccessionWorksheet***SAMPLE:** *2022-2023\_MPITennessee\_SuccessionWorksheet*
   4. Track conversations via Succession Plan Tracking document
   5. RECOMMENDATION: Encourage current volunteers to attend board meetings, sit in on MPI Meetings and calls with no obligations.
2. Host Brainstorming Sessions with board members each quarter as a part of the review process to step 1a above.
   1. RECOMMENDATION: Include as an agenda item on one board meeting per quarter or if possible, at both the mid-year and annual board retreats.
3. Use Personal Assessments for Volunteers to determine what each volunteer would like to get out of their time volunteering.
   1. RESOURCE: **Chapter Board Application** skill ranking as a tool for personal assessment along with the **Chapter Volunteer Leadership Interest Form**.
4. Reach out directly to current volunteers via phone and follow-up via email.
5. Broadly communicate open positions to ensure that chapter members know about opportunities.
   1. RESOURCE: **Nominating Committee Open Position Email**
6. Determine non-volunteers and reasons for not volunteering.
   1. If people are not ready, what can the chapter do to get them ready?
   2. RECOMMENDATION: Use past chapter leadership as a mentors for emerging leaders.
7. If chapter has a mentor program, use as a volunteer pipeline.
8. Chapter Open House/Volunteer Fair – President and/or Board to help volunteer leaders learn about operations as well as ask questions regarding volunteer leadership

# Volunteer Development

Volunteer development starts from day one of membership and it is an ongoing process. This is a continued focus on the succession process, and it is critical to plan for the chapter’s future leadership. It is important to show chapter members and future leaders that the chapter takes their development seriously by providing educational and hands-on experience opportunities. Each chapter should not only create ways to recognize a volunteer’s efforts, but also remember an informal, personal “Thank You” goes a long way too!

1. Review & Maintain **Succession Plan Tracking** document along with Personal Assessments from current and perspective volunteers.
2. Review skills and opportunities with each volunteer to better understand their MPI Volunteer Path and when to move into higher level chapter leadership (it is okay for a volunteer to “skip” a level if ready).
   1. Tracking via **Succession Plan Tracking** document
      1. Include goals and timelines of when they want to move into leadership roles.
   2. Continue to use Personal Assessments to recognize and identify changes with a volunteer’s path and to better determine leadership readiness.
      1. RESOURCE: **Chapter Board Application** skill ranking as a tool for personal assessment along with the **Chapter Volunteer Leadership Interest Form**.
      2. SUGGESTION:Use **past** **volunteer** **leaders** to mentor emerging leaders to build a volunteer leaders confidence and prepare them for their future roles.
   3. Review **Leadership Guidebook** with volunteers.
      1. Communicate available Committee roles at the chapter level
      2. Communicate global volunteer opportunities.
   4. IMPORTANT: Make sure to discuss the different timelines with each set of opportunities, especially from a global to chapter level.
3. Use different channels to provide an overview of opportunities and what it means to be a volunteer leader.
   1. Leadership Academy - Leadership Academy is a leadership training program designed for active MPI Chapter members interested in future leadership roles within the chapter. This one-day session will help you learn about the chapter structure and organization and sharpen your skills as an emerging leader and volunteer.
      1. RESOURCE: **Chapter Leadership Academy PPT Deck; Chapter Leadership Academy Agenda; Chapter Leadership Academy Communications**
   2. Create interesting ways to promote and educate the available chapter roles and responsibilities
      1. RESOURCE: **Volunteer Roles**
   3. Use Mentor Program to help volunteers recognize potential leadership skills and offerings they have for their local chapter
4. Recognize the efforts of volunteers
   1. Recognize leaders with handwritten notes
   2. Communicate with up-and-coming volunteer leaders
      1. RESOURCE: **Letter Resources (Samples)**
   3. Send letter from the Chapter President to the volunteer leader’s boss highlighting the volunteer leader’s contributions
      1. RESOURCE: **President Thank you letter\_Board of Directors**
   4. Showcase volunteers and their contributions in chapter communications
   5. Show appreciation for volunteers through awards, notes relating to their contributions

## Nominations Process

The nomination process should be viewed as an ongoing succession planning activity. It is recommended that the committee and process is transparent to the chapter. The needs of the chapter evolve annually, so the board make-up should also. The member needs will change with the industry trends, economy, and other pressures. These changes need to be reflected in the positions/roles on the chapter board of directors.

1. Leadership Development along with the President and Immediate Past President, should audit the Chapter Board Make-Up prior to Nominating process.
2. Conduct a mid-year (October) Volunteer Needs Assessment for the following year’s board/nomination
   1. What positions are needed?
      1. Look at scaling down number of Board Members or Committees
   2. Can any roles be combined or eliminated based on current relevance?
      1. What are the bare minimum roles needed to still meet bylaws?
   3. Are any new roles needed due to the current environment?
3. Maintain and update the **Succession Plan Tracking** document during the nominations process.
   1. IMPORTANT: If volunteer leaders do not renew in either their current position or apply for a new position, determine why a volunteer leader is leaving the board. Make sure that this volunteer leader maintains their ability to volunteer in hopes that they may return to the board in the future.
4. Important tips for the Nominating Committee
   1. First! Follow the Chapter Bylaws
   2. Be Transparent: Ensure the chapter understands the process and knows who is on the Nominating Committee.
   3. Finding Comfort in being Uncomfortable: Be OK with board vacancies – do not put the wrong people in roles just to fill a position, look for different solutions
   4. Be Inclusive: Consider all applicants even if new to MPI
      1. Use the **board applicant evaluation and comparison** and **Skills and Experience Glossary** to ensure an unbiased review.
   5. Flexibility is key: Boards may not look the same as they have in the past or even last year– and that is OK!
   6. Look to the past: Pull in Past Presidents to fill temporary positions
      1. Look at expired or former members and recruit them to come back to be a leader
   7. Mentorship: Could Past Presidents mentor new Directors or those with little MPI or committee experience?
   8. New is Good: What values/skills do applicants have even if they are new to MPI?
   9. We Haven’t Done that Before: Look for new solutions to filling roles – co-chairs, shorter committee assignments to fit individual needs, role-sharing, “rotating intern” committee positions
   10. Start at the Beginning: Review the application process – is it easy to complete? Is it one application for all roles?

# Transitions & Training

This section focuses on the importance of transitions from the current board member to the new board member. The importance of training each new and transitioning board member is vital to their long-term engagement whether they are continuing in either their current role or moving into a new leadership role. This process is one of the most important steps on the volunteer path because if volunteers do not feel they have been set up for success – they quit. MPI along with chapters have created many tools and resources to ensure a smooth and organized transition process.

1. Board 101
   1. Board 101 – Chapter board orientation about general operations and processes for incoming board leadership.
      1. RESOURCE: **Board 101 Orientation Agenda; Board 101 Orientation Agenda – OTP version; Board 101 Orientation PPT Deck**
2. Transitions
   1. Chapter Leader Transition Meeting – Chapter board leader transition meeting where each outgoing leader meets with the incoming leader to transition any and all materials, timelines, important dates, etc. that are pertinent to that specific board role.
      1. Ensure all transition documents are updated with the current responsibilities and activities needed for the role.
      2. RESOURCE: **THC Board Transition Manual; Chapter Transition Agenda Board Member and OTP versions**
   2. Chapter Leader Shadowing – Incoming Chapter leaders shadow the outgoing chapter leader on monthly committee calls, meetings, etc. as well as review documentation transitioned at the transition meeting.
      1. RESOURCE: **Suggested timeline for Transition Shadowing and Materials**
3. Roles & Responsibilities
   1. Board Roles and Responsibilities are communicated to ensure expectations are set
      1. RESOURCE: **Leadership Succession Manual for Board Roles and Responsibilities**