



ATD Succession Planning Quick Reference Guide for Chapters

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Overview

Typically, ATD Chapter board positions turn over in 1 to 2 years. Therefore, effective and efficient succession planning is essential for chapter continuity and future success.

The Succession Planning Toolkit has been created by a team of leaders (past and present) from various chapters (big and small) to help your chapter:

- Evaluate its future leadership and talent needs
- Identify individuals who can potentially satisfy those needs
- Prepare an individual as a potential leader

This toolkit will help your chapter to develop the bench strength needed to assure that there are qualified people to pick up the ball when a board member leaves. It provides templates and ideas from other ATD chapters to help your chapter develop its succession plan.

A succession plan is your roadmap to taking charge of the future of your chapter.

What is Succession Planning?

Having the right people, in the right place, at the right time is important to sustaining leadership in ATD chapters. Succession planning involves having the right leadership in place at every level of the chapter. Succession planning recognizes that some positions serve as the lifeblood of the chapter and are too critical to be left vacant or filled by less-than-qualified volunteers.

Succession planning is a systematic effort and process of identifying and developing candidates for key chapter leadership positions in order to ensure the continuity of the chapter. For purposes of this document, the succession planning information and tools provided are intended to help chapters build a leadership pipeline and bench strength, as well as help with filling vacant positions that are open due to more immediate circumstances, such as the unexpected resignation of a board member.

An effective succession plan enables chapters to:

- Engage members of the chapter by utilizing their strengths for volunteer positions which grow the leadership pipeline.
 - Build a leadership pipeline/talent pool to ensure leadership continuity.
 - Develop potential successors in ways that best fit strengths.
 - Identify the best candidates for positions.
 - Clearly define competency requirements along with strategies to develop both existing and new volunteer leaders to meet these needs.
 - Identify and transfer key knowledge and information that might otherwise be lost.
 - Ensure that the chapter's current mission and vision are carried forward by future leaders.
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Steps for Creating a Succession Plan

Succession planning is a continuous process that should take place year round in anticipation of the need to transition roles at the end of each board position term. If done correctly, the chapter will have a cadre of qualified members who are more engaged in the chapter, understand the chapter's core mission, vision, and goals, and are ready to assume board leadership roles.



Step 1: Preparation

<u>Task List</u>	
Tasks to achieve goal	Time
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.....	
Calendar waiting time, delays	
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Preparation for succession planning should take place during the chapter's strategic planning for the upcoming term. Be sure your chapter has an updated vision and mission statement and goals for the upcoming term are clearly identified. Being able to clearly communicate these to potential volunteers and future leaders will help align people to right roles and key tasks.

Although the entire board should be responsible for succession planning and seeking potential candidates, a Nominating Committee should be identified to help guide the process. Establish a timeline for the essential tasks to complete the process. Below is an example of a suggested timeline for planning activities.

- **Note:** If your chapter does not follow a calendar year term, adjust accordingly.

Timeframe	Suggested Activities
Throughout the Year (ongoing)	• Develop existing leadership team; use team building activities, assessment instruments, and facilitated leadership development sessions. • Invite members / potential candidates to join committees where they can be exposed to chapter operations, communication, and strategies. • Invite committee members to attend board meetings to expose them to broader chapter experiences. • Encourage personal connections among board members and between the board and prospective volunteers. Learn what motivates individuals (such as McLelland's Motivational Styles: Need for Power, Need for Affiliation, Need for Achievement). • Include succession planning as a recurring agenda item for discussion at board meetings. • Develop smaller, less time consuming "gateway" volunteer opportunities to consistently develop a new pool of leaders.
January	• Engage members in activities and tasks. Hold a strategic planning session and include a discussion about board development opportunities, including participation in the ATD Chapter Leaders' Conference (ALC). • Include participation in ALC for new and/or continuing board members as a budgeted item.
February	Recruit additional members for committees aligned with every board position.
March	• Identify nomination committee chair. • Begin formal nomination process with a Succession Planning (Nominating) committee.
April	Nomination committee meets to review process, outline communications strategy, review documents, discuss diversity needs, etc.

Timeframe	Suggested Activities
May	Formally communicate to chapter members about specific needs for volunteer leaders for next year. Depending on your chapter's by-laws, some positions may be identified as multiple year terms and may be continuing. All interested members should be considered for open positions. Additionally, pay special note to any specific policies included in your bylaws regarding the notification of membership and plan accordingly.
June	- Nominees are given job descriptions. - Confirm commitment, qualifications, and expectations with candidates.
July	Interview candidates (could be formal interviews or informal conversations).
August	Announce candidates in chapter publications, newsletters and events.
September	Members vote on slate of candidates.
October	Newly elected candidates can start attending leadership meetings as more formal members (they may already attend board meetings as key volunteers or committee members) New board members attend ATD Leaders Conference (ALC) Note: It should be budgeted in the beginning of the year to send as many new board members to the conference as fiscally possible.
November	- Retreat for new leadership team (some chapters hold a retreat in January after the new officers officially join the board) - Leaders identify potential successors and recruit for committees and support - Review job descriptions – align with board strategy and update - Join ATD National – use Chapter Leader Discount & ChIP code
December – January	- Appreciate, recognize and celebrate accomplishments of current & outgoing leaders - Recognize volunteers (what gets recognized is repeated) - New officers take oath of office

Sample Succession Plan:

Office	Months 1&2 Advertise need for candidates	Month 3 Secure interested parties. List by name.	Month 4 Select committee and interview candidates.	Month 5 Announce slate of candidates.	Month 6 Hold election and announce results.	Month 7&8 Onboarding of new officers	Month 9 New officers installed
PRESIDENT	Mentor President Elect						
PRESIDENT-ELECT	Engage potential President – Elects all year		Participate as needed in interviews			Assist with onboarding	Lead installation ceremony
						Meet with successor, if applicable	
VP - COMMUNICATIONS	List open positions info. on website			Post on website	Send out ballot to membership	Work 1-1 with new leader	
	Advertise in monthly e-newsletter	Engage members to assist with chapter communications	Ensure job description is ready to go/updated	Include in monthly e- newsletter	Post outcome on website and e-news		
VP - FINANCE	Engage a member with financial activities such as checking in during events					Work 1-1 with new leader	
VP - MARKETING	Engage members to assist with marketing					Work 1-1 with new leader	
VP - PROGRAMS	Engage members to serve on committee and support on going programming idea generation and logistics					Work 1-1 with new leader	
VP - TECHNOLOGY	Engage members to serve on committee					Work 1-1 with new leader	

Step 2: Identify Potential Leaders



Be sure that position descriptions are accurate, up-to-date, and include key leadership characteristics for each role. Analyze your membership (and even potential members) to identify diverse, enthusiastic individuals who demonstrate commitment to the profession and have attributes and interests that match volunteer roles.

The strength and caliber of leadership is the bedrock of your chapter's future. Chapters with high-performing leadership talent and proactive leadership development strategies are able to build and sustain a competitive advantage for their future. Identifying the right leaders to take the reins when the current leadership leaves is a process that requires careful thought and planning. When embarking on your search for future leaders, consider these elements:

1. **Review succession planning objectives and program design** – Align the existing leadership team with the succession planning objectives, and inform/remind them on how succession planning works at the chapter. This will streamline the process and create greater focus for the leadership team.
2. **Identify key areas and key board positions** – Make sure that the current board is crystal clear about the chapter's succession planning needs, so that the succession planning process is comprehensive, yet efficient.
3. **Update job descriptions** – Without accurate job descriptions, the identification of key board positions in Step 3 will be underleveraged.
4. **Analyze the membership** – Consider who has served as a volunteer for any chapter efforts in the past, such as meeting greeters, website administrators, logistics coordinators, or committee members. Think about who has taken initiative or provided feedback and suggestions in the past.
5. **Seek leaders from different organizations representing corporate, non-profit, government and education** – Your chapter will be stronger with diverse perspectives and representation from your community. Ask...
 - a. Does our leadership reflect our membership?
 - b. Do we have leaders from each generation?
 - c. Do we have balance between male / female?
6. **Make a leadership profile** – Whether using a leadership assessment instrument for each current board member, or simply informally assessing talent, the current board will benefit from understanding where it is strong and where it can develop. Ideally, bringing on talent that complements and builds upon existing strengths and addresses areas where the board has room for improvement will strengthen the board and the chapter over the long term.
7. **Compare the chapter's leadership needs with the potential talent of candidates** – Understand how potential talent would fit onto the board. Keep in mind both the immediate needs and the longer term evolution of the board. Don't ignore a potential leader just because an immediate need does not exist. At the same time, don't just bring on new leaders because they seem to have personal potential, even though the board does not have need for their type of skill set. Successful boards often have a diverse composition, such as:
 - ✓ Balance between internal learning practitioners/leaders AND external consultants
 - ✓ Creative, innovative minds that can spark new ideas AND strategic, methodical leaders who can create and execute successfully.
 - ✓ Analytical, detailed people AND affectionate, nurturing people AND assertive, driven people
 - ✓ Experienced chapter leaders who understand and value the chapter's history, and know why certain strategies and decisions have been made AND new chapter leaders who have an abundance of energy to update and adapt existing practices

Step 3: Interview, Select, and Elect Candidates



This step involves the active recruiting of volunteers and potential leaders. Interview candidates to identify where their interests, skills, and experience might best serve the chapter. Discuss the open positions, responsibilities and be sure to set realistic expectations and minimum time commitments. Select candidates as a result of the interviews and announce the slate of candidates to the membership.

The board may choose to conduct formal interviews or informal conversations with each candidate, assessing his or her abilities to make decisions, solve problems, behave appropriately in sensitive situations, and lead those who will report to him or her.

Refer to the *Additional Tips and Resources* section in the Succession Planning Toolkit for tips on the interviewing process.

Board Approval and the Election Process

After collecting recommendations from the interview team, the choices for officers must be approved by the chapter's board of directors.

Many ATD chapters use a nominating committee to implement the election process. Whether the committee presents a single slate of candidates or a listing of all qualified candidates for each office, the slate should include only candidates deemed qualified to hold a particular office.

In many chapters, the candidates are voted on by chapter members via paper or electronic ballot. Candidates are notified that they have been selected and invited to participate in leadership meetings. They often do not hold a voting role in the first meeting they attend, which may be held toward the end of the year. The purpose of including newly elected board members is to learn the structure of the meeting and to get up to speed on issues that may be carried over to the following year. The new board member can also learn from the person who currently holds his/her role. The meeting facilitator should periodically pause to explain the procedures of the meeting.

Step 4: Manage Transitions



Procedures should be in place to address what needs to happen for smooth transitions from an outgoing chapter leader to an incoming chapter leader. These may include what happens at “hand off” time, resources for the new board member, and a clear timeline of steps in the transition phase.

Refer to the *Resources by Chapter Function* in the *Succession Planning: Additional Tips and Resources* document.

A smooth transition is critical when one leader leaves a position and another takes over. It ensures that member service will not be disrupted by the change in personnel, and a smooth start makes it more likely that new volunteers will be successful.

This phase of the succession plan should answer several questions:

- **What is the leadership transition schedule?** There are many options used by ATD chapters. When scheduling your leadership transition, consider including the [ATD Chapter Leaders Conference \(ALC\)](#) is in October. This is an excellent training opportunity for new leaders. You may want to avoid scheduling time-consuming transition activities during the busy holiday season in November and December.
- **How long will the transition period (the time between the election or appointment of new leaders and assumption of office) last?** Most chapters find that two or three months are sufficient.
- **Who will train and orient the new leader?** Ideally it will be the person being replaced. If that person is not available, another leader should be assigned. New leaders should never be left to figure things out solely from printed materials; they need experienced people to guide them.
- **How will the training and orientation be conducted?** Usually, it's a combination of formal and informal methods.

The goal is for the new volunteer to come out of the transition period with the knowledge and skills to perform her leadership role successfully. It should also give them a realistic picture of what the job entails.

Onboarding and Orientation

Onboarding and an orientation should be conducted to help new chapter leaders become familiar with the chapter's mission and objectives and to explain what will be expected of them.

Volunteer onboarding may be a one-on-one conversation between one of the current officers and an individual volunteer or a formal presentation with all chapter officers and new volunteers. Short sessions before or after chapter meetings may be most effective because they not only save time, but also introduce and recognize the new volunteers to other chapter members.

Here are some tips for planning the orientation:

- Have written goals for the orientation
- Provide a history and fact sheet on your chapter, including chapter bylaws
- Include a fact sheet on whom to contact for various needs and questions
- Plan an event that makes the volunteer feel good about becoming involved
- Keep the written materials simple and inexpensive—many of those who attend orientation will never become active volunteers
- Have a task the new volunteers can assist with at that moment, whether it is stuffing envelopes or helping you clean up after the meeting. Have them leave feeling as if they have already contributed something

Refer to the *Additional Tips and Resources* section in the Succession Planning Toolkit for more tips on Training And Developing Volunteers.

Step 5: Monitor, Evaluate, and Update



All key board positions should have succession plans. Key board positions should be able to be filled quickly with competent replacements. Adjust the plan, address new issues, and continually revise, as necessary.

- **Note:** Key positions are identified as President, President-elect, Treasurer, and all VP level positions. Some chapters refer to these as Officers or Executive board positions.

After sufficient time following implementation, program processes and results should be periodically reviewed to assess whether program objectives have been achieved and to identify areas for improvement. Once the evaluation has been completed, modifications to the program should be made.

Evaluating the Program:

There are many approaches to evaluating your succession plan with varying complexity. Measures used to evaluate the effectiveness of programs may range from simple methods such as a member satisfaction survey to more sophisticated processes, such as a return on investment or cost-benefit analysis.

At minimum, a debriefing meeting should be held to answer questions including: What went well? What went wrong? What could be done differently? Make suggestions and recommendations for improving the process so that it runs more smoothly next time. If all goes as planned, the succession planning process will ensure a smooth transition and new leaders are prepared to assume roles as chapter leaders.

Best Practices from Other Chapters

There are numerous succession planning best practices that have been created and implemented by various chapters. For the latest best practices go to the **Share Our Success** section of the Chapter Leader Community at: www.td.org/sos.

Here is a summary of the submissions as of July 2021:

Chapter	Name of Program	Description
Nebraska	Setting Your Chapter Up for Success Through Timely Succession Planning	The chapter recognized that effective and timely succession planning strongly supported its continued success. To further support the succession planning process, the chapter shifted its timeline for identifying, nominating, and voting for open board positions from the third quarter of the year to the second. This change strengthened knowledge management practices, empowered incoming board members to set goals for their terms, made it possible for more chapter leaders to attend ALC, and generally improved onboarding and leaders' understanding of board acumen.
Los Angeles	Succession Planning Program	The chapter developed a process to fill the role of manager for different committees working under a chapter officer with executive voting powers. All chapter volunteers were interviewed by a minimum of two chapter officers, including the president. Interviews were conducted by phone to assess skills and motivational fit. Selected candidates were then invited to the in-person board meeting to meet the rest of the board. For succession planning purposes, a manager can be promoted to director and a director to a vice president as the volunteer serves more terms on the board. This incentive educates and trains newer volunteers in a progressive manner, and recognizes those that continue their service on the board. The program has resulted in a targeted selection of volunteers that are ready to take on the responsibilities of their roles and better prepared to be successors.
Central New York	Leadership Team Onboarding—On Your Own	In need of strong onboarding for new chapter leaders, Central New York developed an asynchronous PowerPoint approach to be reviewed by new leaders on their own time. The deck requires about 20 to 30 minutes for review and includes slide notes to guide the learner through an overview of the chapter's mission, history, membership base, key programs and related activities, and roles. The approach was supplemented with one-on-one meetings with the managing director to discuss each board member's role, responsibilities, and expectations. As a result, the chapter achieved 100 percent participation and created a stronger leadership team.

Chapter	Name of Program	Description
Rocky Mountain	Finding a VP Finance/Treasurer	The Rocky Mountain Chapter found it challenging to fill the role of VP Finance/Treasurer among its membership. As a result, the chapter contacted the local association of CPAs to find an experienced finance professional, who had experience supporting adult learning organizations, to sign on to the position.
Central Ohio	Chapter Operating Procedure and Leadership Handbooks	In an effort to decrease the learning curve when leaders step into new positions and to improve administrative continuity, the Central Ohio Chapter codified the chapter's operating procedures and respective board position responsibilities into a guidebook for easy reference.
New York City	Using Instagram to Promote Board Roles	To promote the chapter election process, introduce chapter members to board members, and target a broader audience for the chapter, the board used Instagram to create visibility. Board members had set questions to answer in addition to an open Q&A for viewers who had follow-up questions. These posts generated content for the chapter's website and newsletter, and the use of the social media platform increased the chapter's brand awareness within the New York City area.
Kansas City	Annual Volunteer Social Media Campaign	The Kansas City Chapter created a unique way to encourage chapter volunteers to share their new roles on LinkedIn. To celebrate the new volunteers and raise awareness for the chapter, they used Canva to design and provide a branded graphic to incoming board members and volunteers to post on LinkedIn. When new volunteers posted about their accomplishments, they also tagged the chapter. Due to this campaign, the chapter's LinkedIn views increased rapidly by 575 percent and unique visitors by 425 percent. In the 30 days after, engagement on other chapter posts had increased by 348 percent, comments increased by 262 percent, and shares increased by 114 percent. Additionally, the chapter's LinkedIn page gained 16 new followers, bringing the total number to 320.
Chattanooga Chapter	Vetting Process for Board Members	To ensure the chapter was placing candidates into the right positions, the chapter used Survey Monkey to create an application. The chapter reviews the submissions and contacts references to get further information about the potential board member. Through the application process, the chapter ensures it provides information about the position itself so that applicants understand the role, which ultimately decreases mid-year turnover.

Chapter	Name of Program	Description
Sacramento	Creation of Volunteer Coordinator Position	The chapter board asked one of its repeat volunteers to serve as volunteer coordinator. As the volunteer coordinator, the person is responsible for keeping a running list of volunteers, recruiting and organizing new volunteers, and sending thank you emails. The board created the new position and started introducing her at the monthly meetings. Since she has been in the position, she has become the face of the volunteer program and has added a personal touch that has gone a long way with the members. The position worked out so well that the person is now transitioning to a voting member of the board as the Director of Programs. Because of this effort, there has been an increase in volunteers, a steady rotation of volunteers, and an organized process in place. The membership is more engaged, and the chapter has gained more publicity.
New York City	Using Associate Vice President (AVP) to Attract Volunteers and Succession Planning	The New York City chapter developed a volunteer strategy to engage more members and shift volunteers to board members. The chapter created multiple associate vice president (AVP) roles to get those interested in volunteering involved in an entry-level volunteer position. AVPs assist a specific vice president with operations, administration, and logistics. The opportunity gives the AVP the ability to take ownership of projects and for vice presidents to include them in further leadership development opportunities. The chapter set up a clear and defined role description and expectations. They marketed the opportunity to its membership and received a lot of interest. Since the execution of the AVP volunteer strategy, several of the AVPs have moved into board positions.
Baton Rouge	Board Leader Onboarding Binder	The Baton Rouge chapter leaders compiled a binder containing important local and national resources to facilitate the onboarding process and maintain the institutional knowledge between outgoing and incoming board members.
Orange County	New Board Member Orientation Experience	The chapter designed and developed a total of 26 microlearning modules to onboard new board members. The topics were determined by interviewing current and incoming board members. The modules were grouped into four sections to be completed in sequential order by incoming board members. However, navigation was left open so any board member could easily access a specific topic if they needed a refresher on ATD and/or chapter knowledge. The onboarding delivered through microlearning will help the chapter reduce meeting times by 50 percent and the cost of year-end meetings by 75 percent, while increasing the effectiveness of arriving at strategic conclusions by 90 percent and board member onboarding engagement and socialization by 95 percent.

Chapter	Name of Program	Description
Sacramento	New Volunteer Recruiting	The Sacramento chapter posted ads on Volunteer Match, JobCrank.com, and LinkedIn. The chapter received over 10 responses and many of those qualified to interview for open associate positions. Associate positions are assistants to directors with the intention of progression into the director's role the following chapter year.
Eastern Pennsylvania	Build and Maintain Your Board on Solid Foundations	The Eastern Pennsylvania Chapter restructured the chapter board, developing new job Descriptions, leadership development as part of a yearly action plan, and a five year strategic plan.
Baton Rouge	Leadership Succession Planning	Over the past few years, the Baton Rouge chapter leaders have focused a great deal of attention on volunteer engagement which in turn grew the leadership pipeline. The Leadership Succession Planning Guide was created to assist chapter leadership with knowledge and commitment transfer.