

Sharing Our Success (SOS) Submission Form

Chapter Name: Puget Sound

Chapter Membership Size: Medium (101-299)

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Submission Title: Building Succession Planning Fluency in our Board of Directors

What did you do? (a 2-3 sentence summary of your effort): We created a Succession Planning strategy that includes the use of a new tool to help Directors identify areas of opportunity, uncover blind spots, and leverage the strengths of our existing volunteers.

Who benefitted from this effort (Target Audience) Check all that apply: Chapter Members
Board Members
Chapter Volunteers

Why did you do it? What chapter needs were addressed?

As one of the CARE Plus requirements, succession planning is an ongoing area of focus for the chapter. Preparing the Board for the future is a monthly conversation. At our recent mid-year retreat, President Sarah Schillen shared her Succession Planning strategy that involved the use of a new tool to help Directors identify areas of opportunity, uncover blind spots, and leverage the strengths of our existing volunteers.

The tool is intended to provide consistent information from each Director that is readily accessible for the Board and Volunteer Recruitment Manager that can be used to support development conversations. Each Board Member continues to be responsible for identifying their successor; this tool empowers them to be proactive in developing new Board leaders. The intent and strategy behind the creation and use of this form is to create a sustainable and repeatable process for Board members in years to come while also allowing Board members to focus on the CARE Plus requirement. The exercise was initiated as part of a larger Board development plan to highlight the key differences between recruiting new talent and the deliberate development of existing chapter volunteers.

The Succession Planning tool begins with a self-assessment question set. These questions help the Board Member evaluate what stage they are at in their own succession planning process. When Board Members finish this section they will be able to identify their stage of readiness and next-step opportunities.

One critical skill when it comes to succession is having the confidence to articulate key responsibilities of the role and the benefits of volunteerism at the Board level. As such, the next step in the planning tool asks the Director to reflect on their role and highlight the key responsibilities and opportunities. The next stage of planning prompts the Board members to reflect on the key attributes so that they can easily identify "Successor material" when they see it. Once potential candidates have been identified, the tool drives the Board member to evaluate the readiness of potential successor candidates. The tool rounds out with a self-reflection inspiring personal commitments.

What were the measurable outcomes? (May include data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)

As yet, there are no measurable outcomes as this exercise was implemented in June 2022 (approximately a week ago). As a result of this we hope to see Board Members thinking critically and consistently about the development and preparation of their fellow volunteers for further Board volunteerism. We also hope to see a more focused approach to recruitment and succession planning as time goes on. While we may not initially see quantitative measurable results, the consistent use of this tool will focus and prepare the Board for long-term success, including having a clear, consistent, and documented approach to how to fill leadership roles.

What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)

This exercise was introduced in June 2022 at the mid-year board retreat. At this time, new Directors had been in their roles for a solid six months with others preparing to roll off at the end of the calendar year. The mid-year implementation ensures that new Directors have had time to onboard in their position. The Succession Planning tool will help Directors take a strategic approach and ensure that they are taking proactive measures to fill their positions behind them. By asking Directors to put their thoughts in writing, the entire Board benefits by better understanding the nuances of their position and their commitment to developing their team. We anticipate that the reflections in this tool will be ongoing as it becomes a useful living document.

Is there anything you would do differently? Not at this time

When did you start working on this effort? Jun 03, 2022

When did this effort go live? Jun 11, 2022

Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers. 10

What resources did you use? Check all that apply: Volunteers
Board Members
ATD Resources

How many volunteers were you able to recruit? None directly as a result of this tool yet.

Which board positions were involved in the effort? President, Director of Finance, All Board of Directors

Select the ATD resources you used. Select all that apply: Other: N/A - This was made "in-house"

Do you have any additional insights to share with other chapters implementing this effort?

Some tips include:

*Make sure that this exercise is completed when the team is free of distractions and is not feeling rushed to head off to another meeting

*To queue this exercise up, we completed a team SWOT analysis around Succession Planning

*We encouraged a collaborative approach to share openly about interests of current volunteers and potential positions that may be a good fit for future role transitions across teams

*Ample time was allowed for private reflection as well as collaborative debrief and engagement

*While the reflection was private, the exercise was facilitated synchronously to create space for emphasizing the importance of the topic at hand

Please attach any documents that help support this submission. It is highly encouraged to submit editable files (ex. Word, Excel, etc): (additional documents and documents over 2MB should be sent to sos@td.org)

<https://www.formstack.com/admin/download/file/12931148400>

How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:

ATD Chapter Leaders Conference (ALC)
NAC Area Call

Would you be willing to apply to present on this submission at the ATD Chapter Leaders Conference (ALC)? *Request for Proposals (RFPs) open in May of each year at td.org/alc. Selected session facilitators receive complimentary registration.

Yes

email_consent

true
