Chapter Leadership Succession Planning

What is Succession Planning?

It is a systematic effort and process of identifying and developing future leaders for key chapter leadership positions in order to ensure the continuity of the chapter. Succession planning is accomplished by identifying individuals with high leadership potential and by ensuring that they are given the necessary experience and training to prepare them to assume higher level leadership positions in the future.

When accomplished, succession planning enables chapters to:

- 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
- ensure that the chapter's current mission and vision are carried forward by future leaders.
- provide for the transfer of significant organizational knowledge.
- minimize the confusion of leadership changeover.
- give outgoing leaders a sense of closure.
- help incoming leadership absorb the special expertise of the outgoing leadership.
- minimize the loss of momentum and accomplishments for the group.

Step 1   **Preparation for Succession Planning**

When creating a succession planning team, it is important to determine the scope of the project and decide how many levels of leadership will be addressed.

During their term, each of your board members should be keeping proper documents about tasks, roles, processes, etc. that will assist an incumbent. This is especially important for treasurers.

Step 2   **Identification of Potential Leaders**

Chapters should identify key leadership characteristics and make sure position descriptions are up-to-date and accurate. Chapters should analyze their membership to identify enthusiastic individuals who demonstrate commitment to the profession and have leadership abilities. The Chapter should recruit and cultivate these leaders.

Step 3   **Implementation of the Succession Plan**

To address a potential leadership skills gap, Chapters could interview candidates to determine a candidate's suitability and answer any questions or concerns that the potential volunteer may have.

Step 4   **Managing 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. A quick meeting between the outcoming and incoming leaders can help pass off important institutional knowledge to help a smooth transition.

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.

Step 6   Adjust the plan, address new issues, and continually revise, as necessary.

Things to Think About
For incoming and outgoing officers, here are some things you may want to think about and prepare for the transition. *Some bullets are particularly relevant for our campus chapters.*

Incoming Officers:
- Your goals for the position
- What position-specific questions do I want to know about (timelines, duties, etc.)?
- *Things I should do or want to do over the summer*
- Individuals I should get to know (partners, students, faculty, etc.)
- Useful resources and service
- *Things I need to know about working with my campus advisor*
- *One University policy I really want to know about*
- Other questions I want answered

Outgoing Officers:
- Contact information (cell phone, future email)
- Email, website, or social media accounts/passwords
- Timelines of important tasks/events
- What forms does this officer position need to complete?
- *How would you like to stay involved with the chapter (as an alumnus/a, serving on a committee or as an advisor, etc.)?*
- What made you successful in the position?

- What challenges did you face in the position?
- What is a goal you had that you were not able to start/complete?
- Any other unfinished business for the incoming officer to be aware of?
- *Things I wish I'd known before I took office were*
- *One University policy I didn't expect or really had trouble with was*