

# *Volunteer Growth & Succession Planning*

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SGNA  
Society of Gerontological Nursing and Leadership, Inc.

## Volunteer Growth and Succession Planning

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## SGNA Volunteer Growth and Succession Planning

- Objectives
  - Discuss volunteer growth
  - Define succession planning
  - Explain how to build a succession plan
  - Describe the role of a mentor
  - List methods to transfer knowledge



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### Volunteer growth

- Your growth as a volunteer depends on
  - Getting the tools you need to excel
    - Education
    - Mentorship
    - Preparation

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### Associations - Where the winners meet!

- Belonging to and being involved in as a volunteer leader leads to -
  - Better positions
  - Happier, more satisfied professionals
  - More investment in the field

Dr. Arthur Brooks, William E. Smith Institute for Association Research, *Where the Winners Meet: Why Happier, More Successful People Gravitate Toward Associations*, 2008.

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### SGNA Succession Planning

- What is Succession Planning?
  - The ongoing process of systematically identifying, assessing and developing talent to ensure leadership continuity for all key positions
    - American Society of Association Executives

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### Critical Questions To Ask Your Board

- How would you handle filling a key regional position if one suddenly became vacant?
- Do you select people to the board based on likeability and need to fill a slot vs. tactical and long-term planning?
- Do you know TODAY who will replace current leaders when their terms end?
- Do current volunteers feel they have benefited in a meaningful way as a result of their service?

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### Why Have A Succession Plan?

- Identify critical volunteer leader positions in the region
- Identify replacements for future vacancies
- Identify individuals who could potentially fill vacancies
- Ensure that the region's current mission and vision will be carried forward by future leaders
- Ensure that next generation of leaders are prepared for their roles

### Outcome of Planning

- Strong leadership that perpetuates growth
- Increased member satisfaction through great services and meetings
- Contingency back-up if volunteer leader cannot complete term
- Volunteer leaders feeling they have personally and professionally benefited as a result of their volunteer experience

### Succession Planning Steps for SGNA Regional Leaders



### Steps to Succession Planning

- Establish a strategic plan for your region (vision, mission, goals)
- Evaluate current volunteer roles: confirm relevancy
- Establish a "line of succession" for positions
  - Evaluate/update job descriptions/customize for your needs
- Analyze member roster for potential volunteer leaders
- Determine the key leaders for whom successors will be identified
- Evaluate value proposition for attracting/retaining volunteers
- Identify leadership competencies for regional leaders

### Succession Planning

- Create Ideal Leadership Competencies
  - SGNA Leadership Performance Goals
    - Communication
    - Leadership
    - Adaptability
    - Relationships
    - Task Management
    - Action Oriented
    - Personal Development
    - Development of Others



### SGNA Leadership Performance Goals

- Communication
  - What are the candidates strengths with respect to communication skills?

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**SGNA Leadership Performance Goals**

- Leadership
  - What are their strengths and weaknesses as a leader?

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**SGNA Leadership Performance Goals**

- Adaptability
  - How does the candidate handle change?

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**SGNA Leadership Performance Goals**

- Relationships
  - What factors make this candidate an effective, valued coworker or teammate?

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**SGNA Leadership Performance Goals**

- Task Management
  - Does this candidate ensure that tasks are completed in a timely manner?

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**SGNA Leadership Performance Goals**

- Action Oriented
  - Could this member get a team back on track?

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**SGNA Leadership Performance Goals**

- Personal Development
  - How would a leadership role in SGNA help the member develop personally?

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### SGNA Leadership Performance Goals


- Development of Others
  - Would this candidate promote positive enthusiasm with others on the regional board?
  - Would he/she be a good mentor?

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### SGNA Succession Planning

- A key to successful succession planning is mentorship!



Pass it on!

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### SGNA Succession Planning

- What is a mentor?
  - A mentor is a wise and trusted teacher who helps others succeed through guiding, teaching and motivating.

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### How to be a Mentor

<b>MODEL</b>	Be aware of your own role modeling, and point out others who are good role models for your people.
<b>ENCOURAGE</b>	Support your people in the risk-taking that is essential to their growth.
<b>NURTURE</b>	Get to know your people's unique skills and capabilities. Work with them to do the most with their talents.
<b>TEACH</b>	Tell it like it is.
<b>ORGANIZATIONAL</b>	Help them avoid those organizational mindfields that are never written about in any policy manual.
<b>REALITY</b>	Be the type of mentor that can admit when a mistake occurred - it happens to us all.

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### Transfer knowledge

- Develop a buddy system for developing new leaders
- Develop a transfer of knowledge information sheet
- Invite members to board meetings
- Invite potential leaders to annual Leadership Conference

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### Steps to Succession Planning

- Select the members who will participate in succession planning
  - Identify the learning needs of the potential member leaders
  - Create a development plan for potential member leaders to prepare him or her for the leadership position
- Interview and select members for leaderships position

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### Getting Started

- Communicate the Process
  - Pre-requisites for volunteer leadership role
    - Demonstrated commitment
  - Responsibilities
    - Expectation for the role
  - Rewards
    - What's in it for the volunteer
- Illustrate benefits of being a leader
- Use tools to help structure plan

### Board Roster

Position	Incumbent	Competencies			Recommended Action
		Leadership	Initiative	Teamwork	
President	Sally Smith	Exceptional	Exceptional	Strong	
President-Elect	Joe Blow	Strong	Strong	Strong	President-elect
Treasurer	Suzie Que	Needs Improvement	Needs Improvement	Needs Improvement	End Term
Secretary	Jane Rogers	Strong	Strong	Strong	Continue in Position
Director	Mary Land	Strong	Strong	Strong	Treasurer

### Succession Grid

Position	Current Volunteer	2009 Projection	2010 Projection	2011 Projection
President				
President-Elect				
Treasurer				
Secretary				
Membership Chair				
Programs Chair				
Director 1				
Director 2				
Director 3				

### Outcome of Succession Planning

- Strong leadership that perpetuates growth
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### Don't Let Anyone Be Fooled!



"We keep moving forward, opening new doors, and doing new things, because we're curious and curiosity keeps leading us down new paths."

~ Walt Disney

Your SGNA involvement will  
help you to  
*take the next step*  
to a long future with  
SGNA Leadership!