

Succession Planning for Leadership Positions

District One 2021 Workshop

Presented by:

Susan Ulino, Leadership Chair

Linda Ring, Immediate Past Governor

Pam Lemieux, Governor

What is Succession Planning?

Succession planning is a process whereby an organization ensures that members are recruited and developed to fill each key role within the Organization.

What is Succession Planning?

Through the process:

- You recruit service-oriented members, develop their knowledge, skills, and abilities, and prepare them for advancement or promotion into ever more challenging roles.
- You retain active members because they appreciate the time, attention, and development that you are investing in them.
- You identify the organization's long-term goals.
- You establish a consistent leadership framework which focuses on the fact that all Altrusans are leaders.

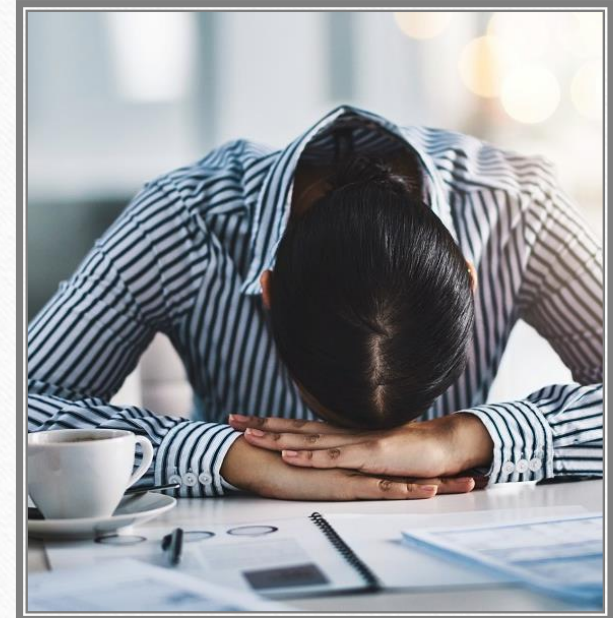
<http://humanresources.about.com/od/glossarys/g/successionplan.htm>


Why do it?

1. It is one of the Goals of Altrusa - *“To Develop Leaders”*
2. Ongoing process to plan for the development of future leaders to support and execute the overall **Strategic Plan** of the Altrusa Club, District and International organizations.
3. **Someone** Needs to Provide Club Direction
4. The Problem with ‘**Burnout**’ is Serious - Could be Catastrophic.

Burnout

- Natural membership attrition
- Member burn-out
- Lack of clarity (not sure of the responsibilities of leadership roles)
- Fear of Failure (we'll address that later)
- Lack of Inclusion (not feeling like part of a team)
- Lack of Flexibility (not being able to attend meetings/events)





Remember, failing to plan is
planning to fail.

~ Ross Elkins

WISEFAMOUSQUOTES.COM

Key Aspects of an Effective Succession Plan

- Formal
- Systematic
- Tailored
- Experientially Based

FORMAL:

- Process in which key pieces are standardized
- Formal requires organizational discipline, informal is reactive
- Identify members who could potentially fill future leadership vacancies
- Consider Altrusa's Long-term objectives and goals
- Identify potential succession gaps
- Integrate succession planning with Altrusa's strategic planning process

SYSTEMATIC:

- Follow a process...
according to a fixed plan, in a thorough and efficient way
- Connected across levels to a coherent whole.
- Evaluate, assign, mentor, execute.

TAILORED:

- Overly generic leadership development initiatives lose sight of the importance of individual differences in developmental readiness.

EXPERIENTIALLY BASED:

- Learning from work-related experience is a more powerful force in development as compared to classroom-based learning.
- We all know that once you've done the job, you understand it better. The club elders should be part of the process.

Not All Competencies for Succession Candidates are **Leadership** Competencies

Altrusa-related

(Organization expertise)

- Knowledge of the Organization
- Service Focus
- Global Perspective

Implementation

(How things get done)

- Flexibility and adaptability
- Communication Skills
- Results Oriented

Leadership

(Setting overall direction and enhancing development)

- Strategic agility (including vision)
- Integrity and trust
- Developing members

How to Start Succession Planning in Your Local Club

Step 1: Promote Leadership as an Altrusa Objective

Step 2: Review Position Descriptions

Step 3: Develop Membership Profile (Talent Bank)

Step 4: Complete your club Succession Plan

Step 1: Promote Leadership as an Altrusa Objective

- Make an investment of TIME, Commitment and Follow-through
- Annually Review your Succession Plans with Your District One Visitor
- Provide Initial Leadership Opportunities (chair or co-chair of committee / board director)
- Encourage Altrusans to Accept leadership roles on the local board (Treasurer, Vice President, President-Elect, President)
- Adjust the Board to include two VP's (ie., Pres-Elect and Vice President, or 1st and 2nd Vice Presidents)
 - *Be sure to confirm the expectation that Pres-Elect or 1st Vice President WILL BE THE PRESIDENT in 2 more years.*

Step 2: Review Position Descriptions

- Evaluate the skills needed to carry out the responsibilities of the various roles of leadership.
- Clearly understand what is required to perform the duties of the office.
- Have the CURRENT position holder review the documents and add or subtract according to your club practices.
- Review skills for characteristics of a effective leadership...

Exercise

10 CHARACTERISTICS OF A

GOOD LEADER



- Integrity
- Ability to Delegate
- Communication
- Self-Awareness
- Gratitude
- Learning Agility
- Influence
- Empathy
- Courage
- Respect

Step 3: Develop Membership Profile (Talent Bank)

- Professional expertise
- Current/Previous leadership roles (yearbook information and International website)
- Skills and Talents
- Passion/Areas of Interest
- Member feedback on skills they want to use or develop
- Committee assignment activity
- Recording of electronic service hours for club projects/activities to gauge club involvement
- Ability to work effectively as a member of a team
- Leadership positions/activities outside of Altrusa

districtone.altrusa.org/resources/

Sections include:

- Local offices held
- Programs chaired
- Jobs I really LIKE
- Events I really LIKE
- Jobs I really DON'T LIKE
- Aspirations
- Involvement on District Level
- Involvement on International Level

Resume worksheet NAME: **LINDA RING** DATE: **August 2021**

Date joined Altrusa June 1990	Who was your sponsor? Mimi Blelefeld
Local Club Offices Held (year) <ul style="list-style-type: none"> • President (1998-2000) • Yearbook Editor (1998-present) • Director (2003-2005) • Parliamentarian (2003-2005) • Secretary (2007-2009) • First Vice President (2009-2010) • President (2010-2012) • Immediate Past President (2012-2015) • Communications Chair (2015-2018) 	Programs Chaired (year) <ul style="list-style-type: none"> • Desserts on Us Fundraiser • World Book Night • Girls Love Mail •
Jobs I really like <ul style="list-style-type: none"> • Yearbook • Creating Flyers • Secretary • Virtual Poetry Contest • Working with Spreadsheets • Mentoring 	Events I really like <ul style="list-style-type: none"> • Hands-on Service • Poetry Reception • World Book Night • Books and Blankets for Babies • Pack the Pickup with Proteins for the Pantry • Girls Love Mail • Make a Difference Day • Workshop, Conference, Convention
Jobs I really don't like <ul style="list-style-type: none"> • Fundraising (but I'll do it) 	
Aspirations <ul style="list-style-type: none"> • To serve on an International Committee, but not as a board officer 	
Involvement on the District Level <ul style="list-style-type: none"> • Governor 2019-2021 • Governor-Elect 2017 - 2019 • Director - 2000-2002 • Parliamentarian • DSB Editor 1999-2001, 2016-2017 • Communications Chair • Immediate Past Governor (2021-present) • Webmaster (2021-present) 	Involvement on the International Level <ul style="list-style-type: none"> • Governor's Council 2019-2021

Step 4: Develop Succession Plan

- Review club Strategic Plan
- List key roles (board, committee chairs, project leads) and position descriptions
- Review your Member Profiles
- Identify 1-2 future roles for each member
 - Who is Ready Now
 - Who will be Ready in 12 - 24 months

How to be Successful

- Be Brave
 - *Remember Superhero stance!*
- Seek Mentoring
 - Support is available from members in your club, other clubs, District One and International– Accept it
- Accept that you will make mistakes – Don't let that deter you.

Believe that we all want you to succeed.

