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Organizational Development

organizational assessment * planning * facilitation * project management * grant proposals

Board Officer Succession & Leadership Development Workshop

1. Why is officer succession & board leadership development planning important?

- Succession planning & leadership development is a way to “grow your own” future leaders.
- It also helps you to enhance the diversity of your leadership through the systematic development of women, minorities, inexperienced, and consumer board members.
- It can shorten the learning curve for board members when they are called upon or volunteer to take on additional leadership responsibilities. They are more likely to be ready when you need them.
- It can increase commitment and loyalty to the organization.
- Why else?

“Leadership” refers to both formal and informal roles.

2. How do we do it?

- Identify critical volunteer leader positions (formal & informal) in the organization.
- Identify potential future vacancies in those positions.
- Establish criteria for leaders in each of these positions.
- Assess current board members’ strengths and potential strengths.
- Identify individuals who could potentially fill these vacancies.
- Determine who is ready now and who could be ready after some preparation.
- Create a plan to prepare future leaders: Go through the worksheets.

3. Where does strategic board recruitment fit?

- It complements strategic board recruitment efforts. You are continually paying attention to board leadership needs and looking both within and without for people who can fill them.

4. How Do We Operationalize this Process?

- For example: Create a “Board Calendar” with annually scheduled tasks such as board assessment (including self assessment), board leadership development and succession planning, board training, strategic recruitment, etc.

The Process: Step-by-Step

Worksheet 1: Leadership Positions

- List by position name.
- Does job descriptions exist?
- If so, is it accurate and up to date?
- If not, should there be one?
- What are the criteria and desired qualifications for this position/role.

Worksheet 2: Strength Assessment

It's important to continually ask: Are our current board members' skills, talents, and other valuable attributes being used and developed to their maximum capacity to help further our mission?

- For each current board member, what are their current strengths?
- What are their potential strengths?
- What steps can we take to help develop their potential strengths?

Worksheet 3: Current Leadership

- Who is currently filling these roles?
- When do their terms or commitments formally end?
- If there is not formal end point, what is your sense of how long each is going to stay in this role?*
- Notes about how well this person is doing in this role.
- Is this person in the right place?
- If yes, how to help develop this person's leadership in this role.
- If not, what is a better role (there may be more than one).
- How to help develop this person's leadership in new role.

** Questions for later: Should there be formal terms limits for officers? Is board member term length sufficient?*

Worksheet 4: Future Leadership

- Identify up to three potential candidates to be next in line for this position.
- How ready is each person to take on this position/role?
- If not ready, how can we help him or her develop capacity to take on this role?