

Successful Succession Planning

BY LEIGH WINTZ, FASAE, CAE

Making sure the board of directors has a continuous supply of quality leaders with the necessary knowledge, skills, and expertise has been a growing challenge for associations for some time. Successful associations have tackled this challenge through solid succession planning that begins long before the nominating committee reports that there are too few candidates to replace the members who must rotate off the board. (Or worse, the committee nominates a full slate of candidates, but there are one or two candidates whose best qualifications are that they're warm bodies willing to fill the spot!)

Serving on the board of an association has cachet as a resume builder and great appeal for those who want to give back to their industry, profession, or cause. However, serving on the board is also perceived as an enormous commitment of time and energy (and in some cases money). In a tough economy, that commitment is even harder to make.

So whose job is it to ensure an adequate number of qualified and capable

candidates? A good succession planning process will engage current board members in finding their successors and articulate a process for staff, the CEO, and other volunteers (such as committee chairs) to participate in to identify and cultivate future board candidates.

Board members need to be on the lookout for qualified successors right from the beginning. In addition to requiring board members to sign the traditional conflict-of-interest statement, some associations are asking members to sign a leadership commitment statement annually. This makes it clear from the outset that looking for a successor is an integral part of being a leader (see sidebar).

It is the board's responsibility to ensure that the association's policies, procedures, and culture foster good succession planning. Ask the following questions:

1. Are the bylaws clear about how to fill a vacancy on the board?
2. Is the nominating process transparent, inclusive, and open?

3. Does the process include a look at what skills and talents the current board has and needs?
4. Do members who want to serve on the board know how to achieve that aspiration?
5. Does it take too long to climb the formal or informal leadership ladder to the board?
6. Does work experience or outside board service count toward qualifying a member for board service?
7. Is it time to evolve the nominating committee into a leadership-development committee?
8. Is there a way to evaluate both individual board performance and the effectiveness of the board as a whole?
9. Do we check with board members annually about changed family or work responsibilities that might need to be taken into account when assigning duties?
10. Do we ask departing board members what we could have done to make their board experience more rewarding, enjoyable, and meaningful?
11. Are we using technology effectively and making the most of valuable face-to-face time to handle strategic issues?

The way to build on the strengths of the current board is to ensure that qualified, capable, and energetic successors are waiting in the wings. Finding those members will be a lot easier if the association has thought about succession planning and identified the talents, skills, and abilities needed for tomorrow's board.

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SAMPLE LEADERSHIP COMMITMENT STATEMENT

Whereas, I choose to belong to the association and have assumed a position of board leadership;

Whereas, I recognize that while other leaders have different styles and skills than me, they share my dedication and loyalty;

Whereas, I acknowledge that leaders have a duty to fulfill their obligations to the membership; and

Whereas, I know that working together magnifies many times the contributions that I can make individually;

Therefore, I pledge to:

1. Uphold the ideals of the association;
2. Devote myself to the the association's mission by setting an example for others to follow in creating positive public awareness, supporting fundraising goals, and increasing membership;
3. Support other elected, appointed, and staff leaders by praising a job well done, offering alternative solutions to problems, giving credit where due to group efforts, supporting decisions made, and offering honest opinions when asked;
4. Identify potential leaders and support my successors; and
5. If unable to fulfill the duties of my position or these commitments, I agree to resign my position in order to allow someone else to have the opportunity for leadership that will help the association grow.