



Board Succession Planning

Contributed by: Emily A. Martin

What better time to start board succession planning for our chapters than when we are bringing on a new slate of officers and installing a new board? We are all in "planning mode" as we look to the upcoming chapter year, and it is the perfect time to plan for future leadership of our chapters.

An excellent way to begin looking at succession planning is to consider what it is that our volunteers are looking for when they take on a leadership role and to consider what they hope to gain from the experience. The Society for Human Resource Management has identified these expectations of a volunteer:

- Complete understanding of the position - time required, required tasks
- To feel welcomed
- Good Training
- Opportunity to do interesting work
- To be appreciated
- To be communicated with
- To know they are helping make the world a better place
- To be socially connected
- To learn something new

If we, as a chapter and as a board, can meet these volunteer expectations, our volunteer leaders will be more likely to continue volunteering and leading in ARMA. But, how do we go about doing this? Here are some ideas for board succession planning.

Establish Clear Expectations

It is important to be up front and clear with volunteers about the responsibilities of their role and the related time requirements. Volunteers will feel more comfortable when they have this knowledge from the beginning and can plan accordingly.

Consider Readiness

We have to be careful not to put volunteers in over their head, which can quickly lead to burn-out. When members express an interest in volunteering, perhaps asking them to co-chair a committee is a better introduction to board activities than asking them to immediately serve as an officer. Another option is to have volunteers serve as co-officers (if your by-laws allow for this arrangement).

Provide Mentors



Chapter Connection

Assign new leaders and potential new leaders a mentor in the chapter. This role would be well suited for our past-presidents or other past leaders. Mentors can answer questions, explain past board decisions and help solve problems.

Shadow Leaders

Allow potential leaders to shadow current leaders and attend board meetings, so they can become familiar with how the board functions, observe the board interaction and see the decision-making process. Strategic planning and budgeting meetings would be especially helpful for potential leaders to gain an understanding of the workings of the chapter.

Leadership Development

Encourage all board members to expand their leadership skills, so you will have a strong and broad pool of future leaders. ARMA International provides opportunities to develop leadership skills at the Region Leadership Conferences and through the Chapter Leader Onboarding Web Seminars. ARMA also offers the Professional Leadership Certificate Program, which is the online leadership training course offered free of charge to all chapter board members.

Evaluate Succession Planning

Finally, we need to take time to look at what we have done and evaluate it. What are we doing well? What do we need to change? What could we do to improve the process? New volunteers and board members will likely have insights and recommendations to improve the board succession planning for the future.

Helpful sources for additional information about board succession planning include the [National Council of Nonprofits](#) and the [Society of Human Resource Management](#).

More information about [ARMA's online Leadership Courses](#) can be found in the chapter operations e-handbook.