

NAYEN Conference
February 25-28, 2016
NorthStar Rotary Youth Exchange

Let's Talk about Succession Planning

Audience Involvement

- Turn to a neighbor and describe what got you involved in Rotary Youth Exchange – be as specific as possible.
 - (2 minutes each)
- Then....tell your neighbor one of the challenges you face in being a leader in Rotary Youth Exchange
 - (1 minute each)

Succession Planning

- What is it again?
- Reason for its importance
- Whose job is it anyway?
- Ideas on how to go about it
- Other Tips to consider
- Let's get your ideas as well!

What is Succession Planning?

- **Succession planning** is a process for identifying and developing internal people with the potential to fill key leadership positions in the organization.
- **Succession planning** increases the availability of experienced and capable volunteers that are prepared to assume these roles as they become available.

Succession Planning Goals

- Identify those with the potential to assume greater responsibility in the organization
- Provide critical development experiences to those that can move into key roles
- Engage the leadership in supporting the development of high-potential leaders
- Build a data base that can be used to make better staffing decisions for key jobs

More Succession Planning Activities

- **Identify** key roles for succession planning
- **Define** the competencies and motivational profile required to undertake those roles
- **Assess** people against these criteria - with a future orientation
- **Identify** pools of talent that could potentially fill and perform highly in key roles
- **Develop** volunteers to be ready for advancement into key roles - primarily through the right set of experiences.

Case Study – NorthStar Rotary YE

- We are all organized a bit differently
- NorthStar is actually two Rotary Districts
- We created a separate Foundation Board to run this activity
- The Board is comprised of DGs, DGEs, DGNs and 6 at large members from the two Districts
- Org Chart for examination

Organization Chart

Who should do Succession Planning

- With the guidance and instruction from the Board, we created a “Nominating Committee”
- Comprised of past 2 Chairs, Current Chair and Future Chair
- Meet Quarterly
- Action required between meetings

How to do Succession Planning

- Being clear on duties and reporting lines is important for volunteers to feel empowered and properly guided when need arises.
- Started at the top leadership and working our way down the chart
- Simultaneously, it is important to invite and encourage volunteers at all levels of the organization
- Provide support to Vice Chairs and other leaders

Important to Remember

- Not all volunteers are motivated by the same things. Learn about where their passions reside.
- It is healthy to have turnover and new ideas for how to address issues
- Based on Rotary principles worldwide
- Have honest discussion about skills and shortcomings for the various roles without making it “personal”

Tips for Successful Leadership

- Consider developing Leadership Planning Meetings about every 6-8 weeks
- Purpose:
 - Allows for communication for near term events and longer term events
 - Helps avoid crisis management
 - Encourage
- Keep notes and follow up

Tips for Successful Succession Planning

- Nominating Committee should plan adequate amount of time to discuss and brainstorm each quarter they meet
- Size of this group...not too big or small
- Make assignments and due dates – find a balance between being too aggressive with timeline and not aggressive enough.
- If paid administrative assistance, be careful not to dump too much on this role....or suffer the consequences.

When do you do Succession Planning

- This is not a singular event.
- It takes time but consider starting with bitesize pieces and simply get momentum on your side
- Set some goals & dates and communicate those goals to the rest of the volunteers.
- Remind everyone that the long term health of the organization is what is at stake.....plus simply more fun with more sharing of the work and agreed upon plans.

Questions & Comments

- Time to share your experiences and best practices!