



Changing the Guard: Leadership Succession

Eight Steps to Effective Recruitment

1. Sell the board opportunity – but not too hard. This is about finding a fit, not begging.
2. Know your organization, where it is, what it needs, how its evolved
3. See transition as an opportunity: Is this a time to rethink our board goals/roles?
4. Create a job description – be thorough
 - a. Roles/responsibilities
 - b. Governance vs. working
 - c. Major activities
 - d. Time/dollar commitment
5. Know it's not just about skills or passion – look for subjective characteristics reflective of leaders
6. Create a board matrix – determine skill sets, demographics desired, ideal number of board members and recruit accordingly
7. Get a resume/meet them: Discuss your organization, find out their goals. Is it a fit?
8. Make the vote an honor, not a given

Three Tips to a Better Year To Come

1. Do not wait for the end of board terms to start thinking about your next board members.
2. Constantly think about who might be your future board members - engage them all year
 - a. As you meet people at fundraising and networking events
 - b. When you talk to donors and volunteers
 - c. When you come across great board members at other organizations
 - d. In your outside activities.
 - e. Get into the habit of thinking whether or not they might be a part of the organization's future...always.
3. Pay attention to:
 - a. Exceptional volunteers

- b. Outstanding committee members
- c. Passionate, continuing corporate, private or individual donors
- d. Great board members at other organizations
- e. Who attends your events and acts as an ambassador for your cause

Four Tips on Succession Planning for New Officers

1. Do not figure out who your officers will be the month before the election. This is far too important – often make or break for the organization.
2. Make it an honor to be an officer
3. As you bring in new board members consider if they might be the next chair or treasurer.
4. Talk through it early

One Tip on Orientation. Do it.

- Once you bring in new board members, do not just assume they will figure things out as they go. Orient them on both being a board member and on your specific organization and how it works

Three Tips When they Transition Out

1. Honor terms and term limits – avoid exceptions
2. Revote: do not assume they will stay through to the maximum terms allowed
3. Thank them when they are done – honor them for their time and service. No matter what.

Who's job is this anyway? Everybody's!

1. Board members in general
2. Board committee/officer
3. Executive Director/CEO

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