

Succession Planning for RTOERO Volunteers

CONTINUITY FOR VOLUNTEER RUN DISTRICTS



Planning for continuity is essential to your districts's ability to sustain itself and continue to thrive over time.

What is Volunteer Recruitment & Succession Planning?



- **Volunteer Recruitment** - the process of finding the right volunteers to meet your organization's volunteer needs.
- **Succession Planning** – an ongoing process for organizations to identify and develop capable and skilled leaders, who can fulfill key roles when they become open. It considers existing organizational needs and future strategic direction.

Volunteer Recruitment: Get People First!



**Volunteers
Needed!**

Intentional Volunteer Recruitment—
planning *how* to recruit before you do
it, so you can be strategic in using the
right approach and the most effective
methods for each approach. This
Increases your success in inspiring
people to join and volunteer.

Best Practices: Recruitment Methods

Recruitment Methods

- Personal direct face-to-face asks to existing volunteers and new members
- Clear descriptions and quick follow-up to responses
- Get to know members; encourage them to volunteer for district roles
- Engage people with diverse backgrounds, perspectives, and life experiences
- Host some fun meetings that are open to your community, introduce new people who attend and make them feel welcome
- Offered options of involvement; don't overwhelm/pressure potential leadership volunteer
- Ask keen supporters who may not be members or volunteers yet

Why Is Succession Planning Important

Maintains organizational memory and volunteer contributions of outgoing members

Find new people to sustain necessary skill sets & knowledge

Find people with skills/experience that align with future strategic direction of the organization

Organized and proactive – training and development plans already in place

“One of the things we often miss in succession planning is that it should be gradual and thoughtful, with lots of sharing of information and knowledge and perspective, so that it’s almost a non-event when it happens”

(Anne M. Mulcahy)

Provided by the Business Families Foundation

Developing Your Succession Plan



Identify Key Positions for Succession

- Identify key roles first, and not individuals you want to recruit
- Do this by thinking about the impact to the district if the position was vacant or left unfilled
- Ask yourself if there are immediate position terms that are coming to an end
- Key positions will be different for every district and will evolve over time
- As you gain people and better systems, create succession plan for all District Executive positions

Identify Key Skills Required

- Identify the skills, experience and /or knowledge required for the key position(s) to meet district needs - now and in the future.
- Skills such as leadership, technical competency, detail focused, networking, problem-solving, or previous board experience might populate your succession plan.
- Having role descriptions for each role is helpful to determine skills, experience and knowledge required.

Find Potential Volunteers

- Identify who is currently in the role and who is in the resource pool that matches the skills, experience & knowledge required
- Goal is to always have an identified person to act as a back-up
- You are almost ready to start volunteer recruitment:
 - think of methods that would align best with the individuals on your list, or
 - when engaging with existing volunteers and community members – have the list of position(s) needed and the skills, *values* & *characteristics* required for the position

**Find People Who
Believe in Your
Mission & Values**



Individual that fills a
"skill" gap

Training and Orientation

Once you have great people, you need to invest in them by providing:

- Robust orientation
- Mentorship for a defined transition period (by past or current volunteers)
- Matching of new people with longer term members and volunteers
- Create Board Orientation Binder that includes:

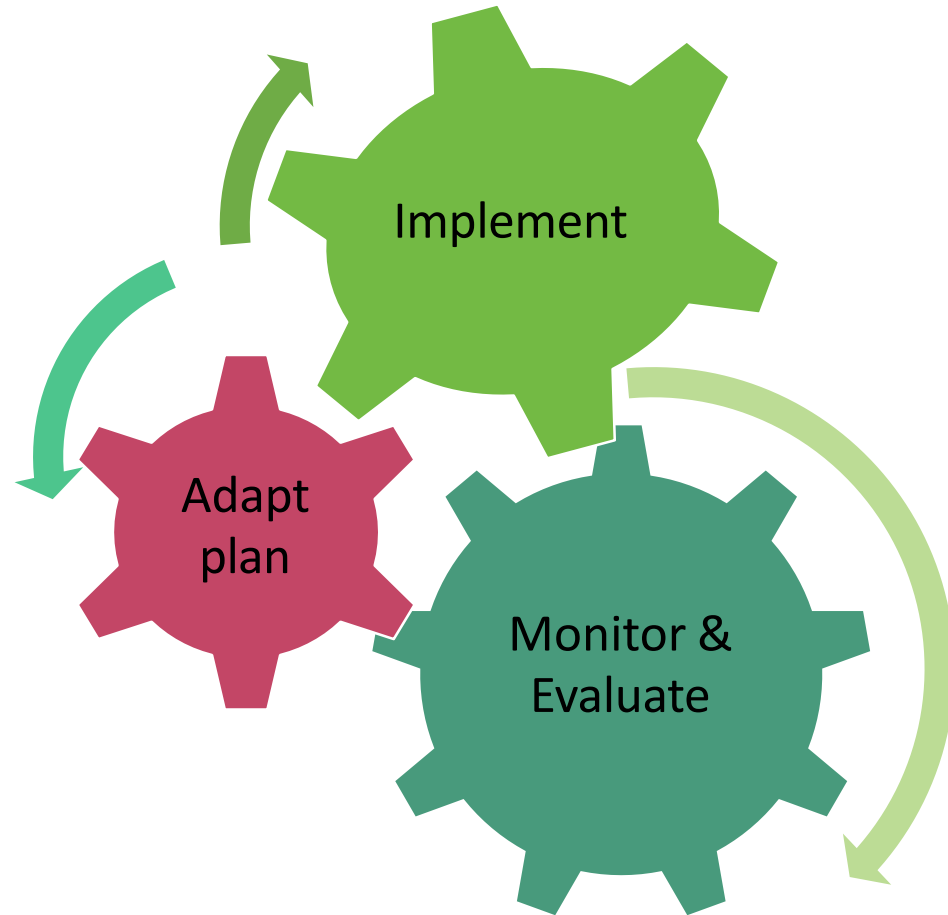
- Bylaws
- History One Pager
- Strategic Plan and other “plans”
- Role Descriptions
- Board Meeting Minutes (3 months)

- Organization Chart
- List of Members & District Executive
- Calendar of Events and Meetings

Succession Planning Grid Template

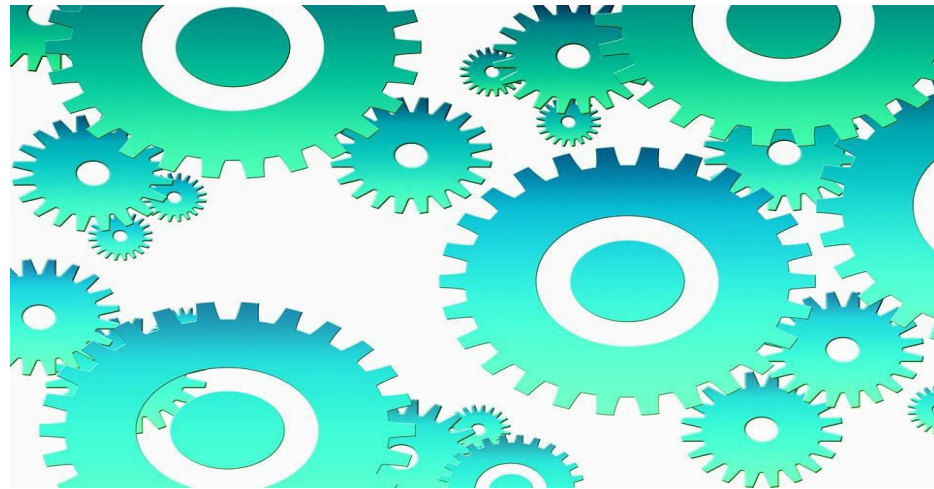
Key Position	Skills, Experience, Knowledge, & Characteristics/ Values	Current Person in the Role	Potential Successor (2 names)	Gap (Yes or No)	Date Position Term Ends/Needed By
Volunteer Recruiter	<ul style="list-style-type: none"> - community engagement and outreach experience - Detail orientated - Passionate about RTOERO members and community 	N/A	Laura – current Goodwill Representative	Yes	May 31 st

Implementing the Plan



Implement

- Create a committee and outline the responsibilities of the District Executive and committees in Committee Terms of References
- Designate who is responsible for recruiting for different positions and who will report to the District Executive
- Make it a standing agenda item for your meetings



Monitor & Evaluate

- Choose measurable indicators for the main priorities of your plan:
 - Have we designated people to recruit for specific roles and is there follow-through when we debrief at meetings?
 - How many existing volunteers stepped into new roles along the volunteer continuum? Do their skills, experience & values match the position?
 - Do key positions have a back-up in place?
 - Are job descriptions up-to-date?
 - How long does it take to fill vacant positions?
 - How frequently does turnover happen and why?
 - What feedback have we received on the orientation/onboarding process?
 - Collect feedback (e.g., informal chats, satisfaction survey, and if possible, exit interviews)



Adapt Plan

- Succession plans are living documents; change as needed
- Debrief volunteer recruitment outcomes:
 - What recruitment method worked well and what could be improved?
 - Was the potential volunteer interested & able to fill key position, or are they a better fit for an episodic or program position
- Debrief evaluation indicators to inform how you make changes to your succession plan

